Food and Agriculture Organization of the United Nations

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CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

45

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 45 countries, including 34 in Africa, are in need of external assistance for food. The effects of the COVID-19 pandemic, particularly through the loss of income and jobs related to containment measures, have severely aggravated global food security conditions, as well as increasing the number of people in need of assistance. Conflicts and weather shocks remained critical factors affecting the current high levels of severe food insecurity.

Asia	1.7
Africa	2.0
Central America and the Caribbean	2.9
South America	2.0
North America	7.7
Europe	-3.9
Oceania	45.6
World	**2.2**

WORLD

Cereal production 2020 over 2019

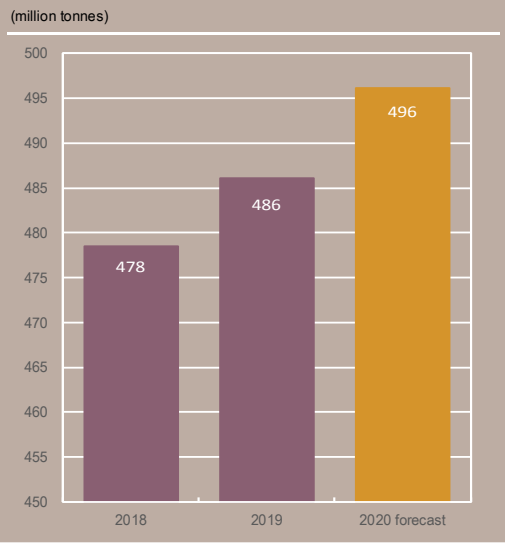
(yearly percentage change)

+2.2%

LIFDC

Cereal production 2020 over 2019

+2.1%



REGIONAL HIGHLIGHTS

AFRICA Larger harvests are estimated in Southern Africa and East Africa, despite floods and outbreaks of desert locusts; although pest damages have been largely contained, serious concerns remain in some countries. Adverse weather reduced wheat outputs in North African countries, while cereal production in West Africa is foreseen at a slightly above-average level. Protracted conflicts continue to limit growth in agricultural production in Central Africa.

ASIA Widespread floods caused damage in several countries in Far East Asia, but rains across the subregion were also beneficial for paddy production and the output in 2020 is forecast at a record high. In the Near East, reflecting improved security conditions and favourable weather, production upturns were estimated in the Syrian Arab Republic and Iraq in 2020. Rainfall shortages generally kept wheat outputs in CIS countries at below-average levels, but barley production increased driven by larger plantings.

LATIN AMERICA AND THE CARIBBEAN In South America, cereal production is forecast to reach a new record high in 2020 underpinned by large maize plantings in Brazil and Argentina, as weak currencies boosted export demand and incentivized farmers. In Central America and the Caribbean, overall favourable weather conditions supported good yields, and cereal production in 2020 is expected at a slightly above-average level.

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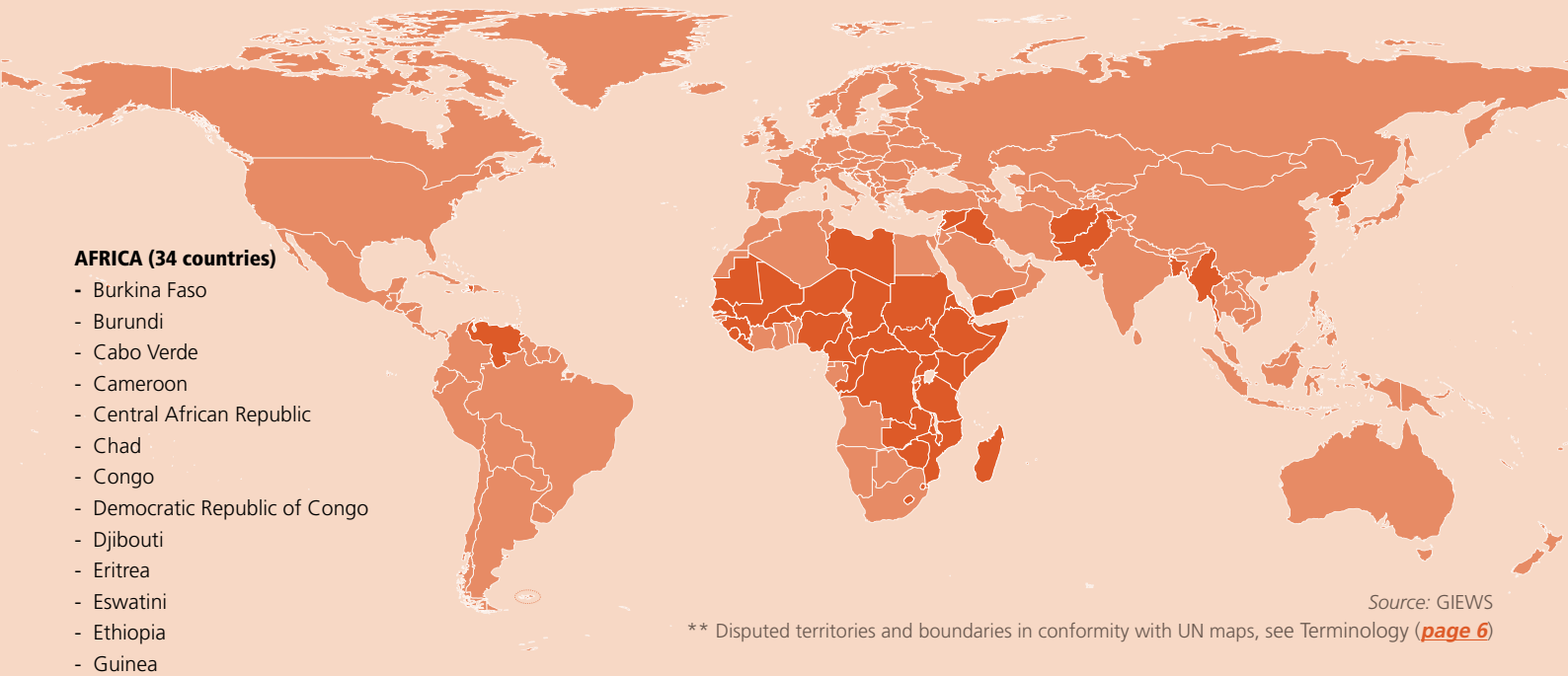


Source: GIEWS

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

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

ASIA (9 countries)
- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Iraq
- Lebanon ✚
- Myanmar
- Pakistan
- Syrian Arab Republic
- Yemen

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

✚ *New Entry*

AFRICA (34 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements with food supply constraints

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

Kenya

Floods, desert locusts

- About 980 000 people were estimated to be severely food insecure in the April-July 2020 period, mainly located in northern and eastern areas as a result of livelihood losses due to floods in late 2019 and localized damages to crops and pastures due to desert locusts.

Somalia

Floods, civil insecurity, desert locusts, COVID-19 pandemic, lingering impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 3.5 million people are estimated to be in need of emergency assistance in the July-September 2020 period. The areas of major concern are southern flood-affected riverine areas, urban IDP settlements, parts of southern Bay and Bakool regions of central Mudug and Galgaduud regions and of northern Sanaag, Bari and Woqooyi Galbeed regions.

Zimbabwe

Economic downturn, below-average cereal harvest, high food prices

- Prior to the COVID-19 pandemic, the number of food insecure people was estimated at 4.3 million in the first half of 2020.
- The current number of food insecure is expected to be higher and remain so until the start of the next harvest from April 2021, due to the negative effects of the pandemic and the associated containment measures that have curbed households' income and disrupted food supply chains. A second consecutive below-average cereal harvest in 2020 and persisting high food prices are also significant food security stressors.

WIDESPREAD LACK OF ACCESS

Burundi

Floods, landslides

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

Chad

Civil insecurity

- After the revision of the humanitarian response plan due to the COVID-19 pandemic, 5.9 million people were estimated to be severely food insecure in August 2020, at the peak of the lean season.
- About 236 000 people were displaced due to insecurity in the Lake Chad Region. In addition, nearly 476 000 refugees from the Central African Republic, Nigeria and the Sudan reside in the country due to persisting conflict.

Democratic Republic of the Congo

Persisting civil insecurity, restrictive measures related to COVID-19 pandemic

- According to the latest IPC analysis, carried out in July 2020, 21.8 million people (over 30 percent of the analyzed population) were estimated to be severely food insecure, 60 percent above the figure that was projected prior to the COVID-19 pandemic.

Djibouti

Consecutive unfavourable rainy seasons

- About 175 000 people were estimated to be severely food insecure in January 2020, mainly due to consecutive unfavourable rainy seasons.
- The regions most affected by food insecurity were Dikhil and Obock, where 45-50 percent of the population were acutely food insecure.

Eritrea

Macro-economic challenges have increased the population's vulnerability to food insecurity

Ethiopia

High food prices, floods, desert locusts, COVID-19 pandemic, impact of previous droughts

- About 8.5 million people were estimated to be severely food insecure between July and September mainly in SNNP, Oromia and Somali regions. The main drivers of the food insecurity are a below-average "Belg" harvest, localized crops and pasture losses due to locusts and the negative impact of the restrictive measures related to the COVID-19 pandemic on food prices and incomes.
- About 175 000 people have been affected by floods triggered by torrential rains in July and August.

Niger

Civil conflict

- According to the COVID-19 assessment carried out in April 2020 by several institutions, an estimated 5.6 million people were affected by the food crisis, including 2.7 million who were estimated to be experiencing severe food insecurity.
- An estimated 265 500 people have been displaced in Diffa, Tahoua and Tillabery regions due to the civil conflicts. In addition, the country hosts approximately 227 800 refugees, mainly from Nigeria and Mali.

Nigeria

Persisting conflict in northern areas

- According to the latest "Cadre Harmonisé" analysis, about 7 million people were assessed to need humanitarian assistance between June and August 2020.
- Over 2.6 million people are estimated to be internally displaced due to conflict in northeastern states of Adamawa, Borno and Yobe, communal clashes in North West/North Central zones and natural disasters. The areas inaccessible to humanitarian interventions are facing the worst food security conditions.

South Sudan

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

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, driven by insufficient food supplies, an economic downturn and soaring food prices.
- About 6.48 million people (55 percent of the total population) were estimated to be severely food insecure in the May-July period. The highest prevalence of food insecurity was estimated in Jonglei State, the area worst affected by the floods, where more than 70 percent of the population were facing severe food insecurity. In July 2020, the number of internally displaced people was estimated at 1.6 million.
- As of early September, about 600 000 people were affected by the floods triggered by torrential rains since July.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the updated "Cadre Harmonisé" results released by the Government, about 3.28 million people were estimated to need external food assistance during the June to August 2020 period.
- Due to the conflict, about 1 million people have been displaced with 50 percent of them living in Centre Nord Region. In addition, about 20 000 refugees, mostly from Mali, are still residing in the Sahel region.

Cabo Verde

Poor performance of the 2019 agro-pastoral cropping season

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

Cameroon

Civil insecurity

- According to a recent analysis conducted by FAO, the World Food Programme (WFP) and the Ministry of Agriculture and Rural Development, about 4.9 million people (18 percent of the total population) were estimated to be in severe acute food insecurity, more than double the figure projected in the last "Cadre Harmonisé" report (March 2020). The escalation is the result of the effects of the COVID-19 pandemic, which added to the impacts of the persisting conflict and population displacements.

Congo

Influx of refugees

- About 700 000 people were estimated to be food insecure in Brazzaville (more than one-third of the city's population), as a consequence of the socio-economic impact of the COVID-19 pandemic, according to a recent study by the Ministry of Social Affairs and Humanitarian Action and WFP.
- Furthermore, there are about 21 000 refugees from the Democratic Republic of the Congo and about 22 000 refugees from the Central African Republic residing in the country. Host communities face food shortages and limited livelihood opportunities, and refugees' food security is essentially dependent on continued humanitarian assistance.

Eswatini

Localized shortfalls in production, reduction in income-generating activities

- About 366 000 people are projected to be food insecure and in need of

humanitarian assistance during the October 2020 to March 2021 period, higher than the current figure of 330 000. The projected deterioration reflects localized production shortfalls, high food prices and the loss of income-generating activities due to the economic downturn instigated by the COVID-19 pandemic.

Guinea

Localized shortfalls of cereal production

- About 267 000 people are estimated to be in need of food assistance during the June-August 2020 period. In addition, over 5 000 refugees were residing in the country.

Lesotho

Localized shortfalls in production, loss of income-generating activities

- About 380 000 people in rural areas were projected to face acute food insecurity between July and September 2020, while the projection for the October 2020 to March 2021 period indicates an increase to 582 000 people. The projected deterioration reflects high food prices and the loss of income-generating activities due to the economic downturn instigated by the COVID-19 pandemic.

Liberia

High food prices

- According to the last "Cadre Harmonisé" analysis, about 41 000 people were estimated to be in Phase 3: "Crisis" and above in the June-August 2020 period. The country is hosting approximately 8 200 refugees.

Libya

Civil insecurity, political instability, low oil prices

- The total number of people in need of humanitarian assistance in 2020 was estimated at 0.9 million, of which 0.34 million require food assistance. Refugees, asylum seekers and internally displaced are among the most vulnerable. The number of people is likely to increase as the local currency depreciates, food prices increase and COVID-19 constrains work opportunities for casual labour.

Madagascar

Reduced harvests in southern areas, high food prices and limited income-earning opportunities

- About 554 000 people were estimated to face acute food insecurity between April and June 2020 in southern and southeastern regions, nearly one-third higher than the same period in 2019. The higher prevalence of food insecurity mainly resulted from the lower availability of, and access to, food, owing to reduced crop production, high food prices and limited income-earning opportunities for rural households in southern regions.
- The impacts of the COVID-19 pandemic were not included in the latest estimation and, therefore, the food insecurity situation is expected to be more severe and could even deteriorate further from the third quarter of 2020 to early 2021.

Malawi

Localized production shortfalls, income losses associated to an economic slowdown

- According to the last official figures, an estimated 2.7 million people were assessed to be food insecure in 2020, of which 1.9 million live in rural areas and the remaining 800 000 live in urban areas. Despite the upturn in cereal production in 2020, the direct and indirect effects of the COVID-19 pandemic have curtailed access to food through income losses and disruptions to the food supply chains, sustaining high levels of food insecurity.

Mali

Civil insecurity

- According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), 6.8 million people were estimated to be severely food insecure in August 2020 (one-third of the population).
- Over 266 000 people have been displaced in central and northern parts of the country. In addition, the country hosts approximately 43 000 refugees.

Mauritania

Poor performance of agro-pastoral cropping season

- According to the last "Cadre Harmonisé" analysis, about 609 000 people were assessed to need assistance between June and August 2020.
- About 65 000 refugees, mostly from Mali and who require assistance, reside in the country.

Mozambique

Economic downturn, localized shortfalls in staple food production, insecurity in northern areas

- Prior to the COVID-19 pandemic, nearly 2 million people were assessed to be food insecure.
- The current food insecurity situation is expected to be more severe and could deteriorate further from the third quarter of 2020 to early 2021, due to the negative effects of the COVID-19 pandemic, on account of income losses and disruptions to food supply chains, while shortfalls in production in southern regions is an additional driver of the poor food security conditions.
- Insecurity in the northern Cabo Delgado Province has resulted in the internal displacement of about 250 000 people and severely hampered the delivery of humanitarian assistance. In this Province, as of July 2020, about 310 000 people were estimated to be severely food insecure.

Namibia

Shortfalls in agricultural production

- Prior to the COVID-19 pandemic, about 354 000 people, were projected to be in need of food assistance between April and September 2020, nearly 20 percent below the estimate for the October 2019 to March 2020 period, reflecting the positive impacts of the production recovery in 2020.
- However, the food insecurity could deteriorate from the third quarter of 2020 to early 2021, due to the negative effects of the COVID-19 pandemic, primarily channeled through income and job losses.

Senegal

Localized shortfalls in cereal production

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

Sierra Leone

High food prices

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

Sudan

Conflict, civil insecurity, COVID-19 pandemic, soaring food prices

- The number of severely food insecure people was estimated at 9.6 million for the June-September 2020 period. The areas most affected by food insecurity are South Kordofan and Blue Nile states, and most of the Greater Darfur Region.

Uganda

Localized crop production shortfalls, refugee influx, floods

- About 500 000 people were estimated to be severely food insecure in eastern Teso Region and northeastern Karamoja Region in early 2019 (latest available information).
- About 882 000 refugees from South Sudan and about 416 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

United Republic of Tanzania

Localized crop production shortfalls

- About 499 000 people were estimated to be in need of emergency assistance in the May-September 2020 period, mainly in northeastern Manyara and Kilimanjaro regions and in central Dodoma and Singida regions, where 2019 harvests were affected by prolonged dry spells that resulted in significant cereal production losses.

Zambia

Localized production shortfalls, high food prices

- The upturn in cereal production in 2020 is expected to have improved food availability, positively impacting food security conditions.
- However, in southern parts of the country, shortfalls in production for a second consecutive year sustained high levels of food insecurity in these areas. Furthermore, the effects of the COVID-19 pandemic have aggravated food insecurity across the country and its impacts are likely to have kept the number of people in need of assistance at similar levels to last year, when 2.3 million people were facing severe food insecurity.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Lebanon ✚

Financial and economic crisis

- On 4 August 2020, an explosion in the Beirut Port resulted in the loss of lives and destruction of parts of the port including the bulk terminal and main grain silo, adding another dimension to a multi-faceted crisis the country is facing.
- According to the Ministry of Finance, about 45 percent of Lebanese citizens (equivalent to 2.43 million) lived in poverty as of April 2020, with 22 percent in extreme poverty. This figure is likely to be higher as increasing inflation and unemployment resulting from deepening economic crisis, coupled with the impact of COVID-19 related measures constrain employment opportunities and incomes.

Syrian Arab Republic

Civil conflict, stagnant economy

- According to WFP's Vulnerability and Analysis Mapping (July 2020), there were 9.3 million people food insecure and a further 2.2 million at risk of food insecurity.
- Although some international food assistance is being provided, Syrian refugees are also pressuring host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, economic downturn and floods

- A large portion of the population suffers from low levels of food consumption and very poor dietary diversity.
- The economic constraints, particularly resulting from the global impact of the COVID-19 pandemic, have increased the population's vulnerability to food insecurity.
- Floods, caused by several typhoons in August and early September, affected large number of people and resulted in the loss of livestock and food supplies in southern parts.

Yemen

Conflict, poverty, floods, high food and fuel prices

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

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict, population displacement, economic slowdown

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

Bangladesh

Economic constraints, monsoon floods

- The food insecurity situation is expected to deteriorate due to income losses and a decline in remittances as a result of the COVID-19 pandemic's impact on the national economy.
- Severe floods in July, which followed Tropical Cyclone Amphan in May 2020, severely affected the livelihoods of at least 5 million people, caused damage to the agricultural sector and destroyed houses and infrastructure.
- According to the latest figures from UNHCR (August 2020), about 860 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. The large number of refugees have put a strain on the local community as well as existing facilities and services.

Iraq

Civil conflict, low oil prices, economic slowdown

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

Myanmar

Economic constraints, conflict in parts of Chin, Kachin, Shan, Kayin and Rakhine states

- Income losses and a decline in remittances due to the impact of the COVID-19 pandemic are expected to affect the food security situation of most vulnerable households.
- Persistent conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large scale population displacement particularly since 2017. As of June 2020, an estimated 235 000 people, mostly women and children, were internally displaced, with the largest share of these IDPs sheltering in Rakhine and Kachin states.

Pakistan

Population displacement, high prices of main staple (wheat)

- The country hosts close to 1.4 million registered and unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and are straining the already limited resources of the host communities.
- Prices of wheat and wheat flour, the country's main staples, have been at high levels since the beginning of the year, constraining access to food.
- About 1.18 million people are currently estimated to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency" levels of food insecurity in the administratively merged areas of Khyber Pakhtunkhwa.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela

Severe economic crisis

- Amid the severe and high food prices protracted economic crisis, the number of refugees and migrants from the country is estimated at 5.2 million. They have settled in neighbouring countries, including Colombia (1.8 million) and Peru (830 000). Humanitarian assistance is needed for residents in the country as well as refugees and migrants in host countries are significant.
- According to WFP's Food Security Assessment, conducted in the third quarter of 2019, about 2.3 million people (8 percent of the total population) were severely food insecure, mainly as a result of the high food prices.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Prolonged dry spells and high inflation

- About 4 million people are estimated to be facing severe acute food insecurity and thus in need of urgent food assistance in the August 2020-February 2021 period due to the reduced 2020 main season cereal output, coupled with the high food prices and the economic downturn. Declining remittances and income losses amid the COVID-19 pandemic are likely to exacerbate the already poor food security situation.

Terminology

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

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

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

page 12 (Africa)
page 23 (Asia)
page 31 (Latin America and the Caribbean)

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

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview[1]

Cereal supplies to remain ample in 2020/21 despite a cut to the global production forecast

FAO lowered its forecast for world cereal **production** in 2020 by 25 million tonnes (0.9 percent) in September compared to the previous forecast in July. Notwithstanding this downturn in prospects, the expected global cereal output still stands at 2 765 million tonnes, an all-time high and 58 million tonnes above the 2019 outturn.

This recent production cutback results from a reduction in the world coarse grains forecast, now pegged at 1 496 million tonnes, down 23.5 million tonnes from the previous forecast in July. The bulk of the decline relates to a 26.3-million-tonne downward revision to the maize production forecast in the United States of America, where plantings, albeit still up year on year, are lower than earlier expectations and recent storm damage in the Midwest caused crop losses and impaired yield prospects. Overall, however, yields are still expected to recover from the previous year's low level and the country's output is forecast at 380 million tonnes, 10 percent higher than in 2019. Production forecasts were also lowered in the European Union and Ukraine, due to adverse weather that diminished yield prospects, and in Indonesia, where the historical production estimates as well as the 2020 forecast were revised downwards in line with recently released official statistics. These reductions more than offset upward revisions to the maize production forecasts in Argentina and Brazil, with

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

	2018	2019 estimate	2020 forecast	Change: 2020 over 2019 (%)
Asia	1 184.2	1 196.0	1 216.2	1.7
Far East	1 085.1	1 089.6	1 105.3	1.4
Near East	65.0	72.6	76.1	4.8
CIS in Asia	34.2	33.9	34.7	2.6
Africa	198.4	190.8	194.7	2.0
North Africa	38.0	36.1	33.0	-8.8
West Africa	65.9	65.9	63.7	-3.3
Central Africa	6.1	6.0	5.9	-1.4
East Africa	56.6	54.1	56.2	3.9
Southern Africa	31.9	28.7	35.9	25.2
Central America and the Caribbean	42.5	42.5	43.7	2.9
South America	197.4	228.3	232.9	2.0
North America	495.2	478.8	515.9	7.7
Europe	497.3	541.9	520.9	-3.9
European Union[2]	294.2	324.1	280.8	-13.4
CIS in Europe	188.0	202.7	206.4	1.8
Oceania	30.9	27.9	40.7	45.6
World	2 645.9	2 706.3	2 764.9	2.2
Developing countries	1 614.0	1 648.8	1 678.6	1.8
Developed countries	1 032.0	1 057.5	1 086.3	2.7
- wheat	732.4	761.6	760.1	-0.2
- coarse grains	1 407.3	1 443.8	1 495.6	3.6
- rice (milled)	506.3	500.8	509.2	1.7

Note: Totals and percentage change computed from unrounded data.

[1] Includes rice in milled terms.

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

[1] Based on the FAO Cereal Supply and Demand Brief released on 3 September 2020.

both countries expecting record high harvests. The forecast for global barley production in 2020 has been trimmed by 1.2 million tonnes, driven by lower yield prospects in the European Union, and now stands at 154.2 million tonnes. By contrast, world sorghum production is now expected to reach nearly 60 million tonnes, 6 percent higher than the previous year, following increased forecasts for India, Mexico and the United States of America. Global wheat production has been reduced by 1.4 million tonnes since July, which puts this year's output at 760.1 million tonnes, marginally below the good outturn of 2019. The recent decrease is mostly the result of cuts to the production forecasts in Argentina, the European Union and the United States of America by 1.3 million, 4 million and 1.1 million tonnes, respectively, which outweighed upward revisions for Brazil, Canada, the Russian Federation and Ukraine. Small area-based increases to the July forecasts of rice production in Colombia, the Philippines and the United States of America compensated for more downbeat expectations of output in the Lao People's Democratic Republic and Viet Nam. As a result, global rice production in 2020 is still projected at an all-time high of 509 million tonnes (milled basis), up 1.7 percent from the 2019 reduced level.

The forecast for world cereal **utilization** in 2020/21 has been increased by 11 million tonnes since July, now amounting to 2 746 million tonnes, up 63.1 million tonnes (2.4 percent) from the 2019/20 level. The projected growth and upward revision this month mostly reflect a foreseen increase in total utilization of coarse grains, revised up by 8.4 million tonnes since July and now surpassing the 2019/20 level by 51.5 million tonnes (3.6 percent). An anticipated increase in feed use of coarse grains, especially maize, up 31.4 million tonnes (3.8 percent) from the 2019/20 levels, is the biggest driver of the expected annual growth. However, the recovery of industrial use from last year's slump, is now seen to increase by 16.4 million tonnes (4.2 percent), as ethanol demand regains ground, also contributes to the anticipated expansion. The forecast for total wheat utilization in 2020/21 has also been lifted since July, albeit marginally (by 2 million tonnes) to 756 million tonnes, representing an increase of 3 million tonnes from the 2019/20 level. Higher food consumption is the main driver behind this increase, while the feed demand for wheat is likely to remain suppressed and its industrial use to stagnate. World rice utilization in 2020/21 is pegged at 511 million tonnes, up 600 000 tonnes from July expectations and 1.7 percent above the 2019/20 level. Although non-food uses of rice are anticipated to recover over the season, the predicted expansion is forecast to be driven by food intake, rising at a faster rate than the population growth aided by large supplies and food assistance programmes.

The forecast for world cereal **stocks** by the close of the 2021 seasons has been cut by 33.4 million tonnes since July, dropping to 895.5 million tonnes, but still up 14.6 million tonnes (1.7 percent) above their opening levels and representing an all-time high. This month's downward revision of the global cereal stocks and the lifting of world cereal utilization forecast results in the 2020/21 world cereal stocks-to-use ratio dropping to 31.8 percent, down slightly from July and the lowest in four years, but still relatively high from a historical perspective. The bulk of the downward adjustment to global stocks is the result of an expected 24-million-tonne reduction in maize inventories in the United States of America, triggered by reduced production. This cut in maize stocks lowers the forecast for total global coarse grain stocks to 432.1 million tonnes, down 30.9 million tonnes since July but still 10.8 million tonnes (2.6 percent) above their opening levels. Despite a slight downward revision (by 1.6 million tonnes), global wheat inventories at the close of the 2021 seasons are also still predicted to increase by 5.7 million tonnes (2 percent) above their opening levels and reach 282.2 million tonnes, the second

highest on record. However, most of the forecast increase stems from an expected 11-million tonne rise in China's (mainland) wheat inventories from the previous season. By contrast, following a 1 million tonne downgrade since July, world rice stocks are now seen falling 1 percent below their opening levels to 181 million tonnes, which is still the third highest volume on record. This latest revision primarily reflects lower anticipated reserves in importers, particularly China (mainland), which is also envisaged to account for much of the forecast annual stock drawdown. Conversely, 2020/21 carry-outs in the major rice exporters were raised further and are now predicted to reach a seven-year high.

FAO's forecast for world **trade** in cereals in 2020/21 is pegged at 441.4 million tonnes, up 7.1 million tonnes from the July forecast and 6.3 million tonnes (1.6 percent) above the 2019/20 level. The forecast for world wheat trade in 2020/21 (July/June) has been raised to 181.5 million tonnes, up 2.9 million tonnes from July and marginally (0.3 percent) above the 2019/20 record level. The more robust wheat import demand in 2020/21 will likely be met by larger shipments from Australia and the Russian Federation, offsetting an anticipated cut in exports by the European Union. The forecast for world trade in coarse grains in 2020/21 (July/June) has also been lifted, by 3.9 million tonnes; it now points to a likely trade expansion of nearly 4 million tonnes (1.9 percent) from the 2019/20 level and marking a new record. Higher world trade of maize than earlier anticipated is responsible for most of this month's upward adjustment, reflecting strong import demand, especially in Asia, amid large supplies in major exporters. Despite a 400 000-tonne downward revision from July, ample exportable supplies and rekindling African demand are expected to sustain a 6 percent annual expansion in international rice trade in (calendar year) 2021 to 47 million tonnes.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2018/19	2019/20 estimate	2020/21 forecast	Change: 2020/21 over 2019/20 (%)
Production[1]	*2 645.9*	*2 706.3*	*2 764.9*	*2.2*
Developing countries	*1 614.0*	*1 648.8*	*1 678.6*	*1.8*
Developed countries	*1 032.0*	*1 057.5*	*1 086.3*	*2.7*
Trade[2]	*410.4*	*434.3*	*441.4*	*1.6*
Developing countries	*144.3*	*163.5*	*160.6*	*-1.8*
Developed countries	*266.1*	*270.8*	*280.8*	*3.7*
Utilization	*2 674.9*	*2 683.3*	*2 746.4*	*2.4*
Developing countries	*1 814.0*	*1 827.8*	*1 874.3*	*2.5*
Developed countries	*860.9*	*855.5*	*872.2*	*1.9*
Per caput cereal food use (kg per year)	*149.6*	*149.7*	*150.1*	*0.3*
Stocks[3]	*868.1*	*880.9*	*895.5*	*1.7*
Developing countries	*677.0*	*691.5*	*696.7*	*0.8*
Developed countries	*191.2*	*189.4*	*198.8*	*4.9*
World stock-to-use ratio (%)	***32.4***	***32.1***	***31.8***	***-0.8***

Note: Totals and percentage change computed from unrounded data.

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

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

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

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

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

	2018/19	2019/20 estimate	2020/21 forecast	Change: 2020/21 over 2019/20 (%)
Cereal production[1]	478.5	486.1	496.2	2.1
excluding India	255.3	260.3	263.1	1.1
Utilization	517.3	527.9	543.5	3.0
Food use	391.8	398.8	408.5	2.4
excluding India	222.6	227.5	231.1	1.6
Per caput cereal food use (kg per year)	151.9	152.3	153.6	0.9
excluding India	154.8	154.8	154.0	-0.5
Feed	56.3	58.2	61.1	5.0
excluding India	41.1	41.9	43.1	2.9
End of season stocks[2]	105.6	111.1	112.1	0.9
excluding India	58.3	55.9	54.8	-1.8

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

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

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

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

Large outputs in Africa and India push up LIFDCs cereal production

FAO's forecast for aggregate cereal production of Low-Income Food-Deficit Countries (LIFDCs) in 2020 stands at 496 million tonnes, 10 million tonnes above the previous year and 7 percent higher than the five-year average. At this level, the aggregate cereal production in 2020 is foreseen to increase for a fifth consecutive year driven, this year, by production upturns in India and several countries in *East* and *Southern Africa*.

In *Southern Africa*, harvesting of the main season crops concluded recently. Overall conducive weather conditions supported an increase in the harvested area and yields in **Malawi** that resulted in a bumper output, and also led to slightly above-average cereal outturns in **Madagascar** and **Mozambique**, although harvests in these countries remained broadly unchanged on a yearly basis. In **Zimbabwe**, despite a production upturn in 2020 compared to the drought-reduced harvest in 2019, this year's cereal output is still estimated well below the average, owing to erratic rains and economic difficulties that hindered access to agricultural inputs. In *East Africa*, harvesting of the 2020 main season cereal crops is underway or about to start in northern and central parts of the subregion. Above-average harvests are forecast in **the Sudan**, **the United Republic of Tanzania** and **Kenya**, reflecting abundant rains that are expected to result in an increase in yields. The heavy rains however, also triggered flash floods and caused localized crop losses. Although large scale control operations have lessened the impact of desert locust outbreaks on pastures and crops, concerns still remain about rural livelihoods in parts of **Somalia**,

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

Kenya and **Ethiopia** that were most affected by the pest. In *West Africa*, harvesting of the main season cereal crops is underway in central parts of the subregion. Aggregate production in *West Africa* is anticipated to decline in 2020 compared to the high level in 2019, but still remain above the average, reflecting average plantings and good yield prospects. In *Central Africa*, production is forecast to be virtually unchanged on a yearly basis and at a near-average level, as conflicts in several countries, including in the main producers **Cameroon** and **the Democratic Republic of the Congo**, as well as COVID-19 containment measures have impeded growth in agricultural production.

In *Asia*, aggregate cereal production among LIFDCs is anticipated to increase and remain at a well above-average level in 2020, mostly due to the large wheat, maize and rice harvests in **India**, the largest cereal producer, and a bumper output in **Bangladesh**. These production expectations are underpinned by above-average seasonal rains, which supported overall good yield prospects, but also triggered floods and caused localized crop losses in parts of **India**, **Bangladesh**, **the Democratic People's Republic of Korea** and **Nepal**. Significant production gains are also forecast in **the Syrian Arab Republic**, where improved security conditions, coupled with favourable weather, instigated an increase in yields for a second consecutive year. By contrast, cereal production is forecast to decline in some *CIS Asian* countries, particularly in **Uzbekistan**, where yields and plantings declined compared to the previous year's bumper level, but still remained near the average.

Import requirements of cereals increase despite overall production gains

The cereal import requirement for LIFDCs in the 2020/21 marketing year is estimated at 73.2 million tonnes, up 3.5 million tonnes on a yearly basis and about 4 percent above the five-year average. The increase in import requirements stems from larger needs in *West African* countries, due to the anticipated shortfalls in production in several countries. A notable increase in import requirements is also estimated in *Southern Africa*, almost entirely resting on large import needs by **Zimbabwe**, where production remained at a well below-average level, and, to a lesser extent, in **Madagascar**. Imports are also forecast to increase in several *Asian* countries, notably in **Afghanistan**, **the Democratic People's Republic of Korea** and **Nepal**, reflecting anticipated production declines in 2020.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

	2018/19 or 2019	2019/20 or 2020		2020/21 or 2021	
	Actual imports	Import forecast	*of which food aid*	Import requirement[1]	*of which food aid*
Africa (37 countries)	*27 132*	*28 507*	*1 168*	*31 386*	*1 159*
East Africa	*11 070*	*11 850*	*818*	*12 312*	*818*
Southern Africa	*2 652*	*3 116*	*20*	*3 573*	*14*
West Africa	*10 719*	*10 857*	*174*	*12 634*	*170*
Central Africa	*2 692*	*2 684*	*156*	*2 868*	*156*
Asia (11 countries)	*40 945*	*39 735*	*1 006*	*40 287*	*1 032*
CIS in Asia	*4 995*	*5 021*	*0*	*5 051*	*0*
Far East	*24 553*	*25 163*	*191*	*25 625*	*202*
Near East	*11 397*	*9 552*	*815*	*9 612*	*830*
Central America and the Caribbean (2 countries)	*1 425*	*1 480*	*10*	*1 502*	*10*
Oceania (1 country)	*62*	*62*	*0*	*64*	*0*
LIFDC (51 countries)	*69 563*	*69 784*	*2 184*	*73 240*	*2 201*

Note: Totals computed from unrounded data.

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

REGIONAL REVIEWS
AFRICA

Source: GIEWS

** See Terminology (page 6)

Africa Production Overview

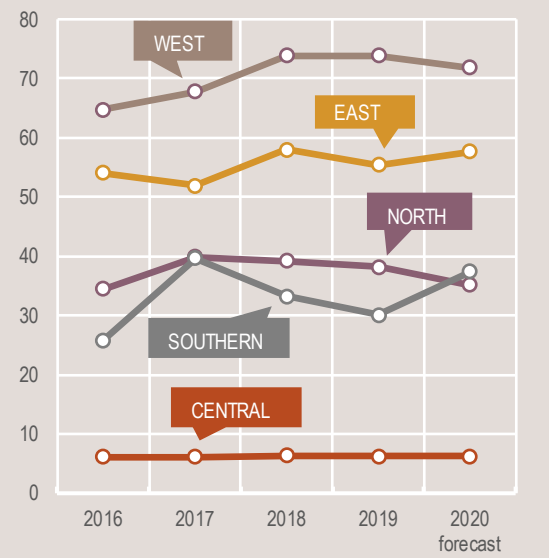
Aggregate cereal production in Africa is forecast at 208 million tonnes in 2020, nearly 4 million tonnes above the previous year and 5 percent higher than the five-year average. The above-average outturn reflects a large maize output in Southern Africa, owing to strong production recoveries in South Africa and Zambia, and good production prospects in East Africa, namely in the Sudan, the United Republic of Tanzania and Kenya. However, concerns still remain about the effects of desert locusts on rural livelihoods in parts of Somalia, Kenya and Ethiopia, despite large scale control operations that have prevented a more significant impact on crop production.

In West Africa, cereal production is forecast above the average, in spite of a yearly decline compared to the high output in 2019.

In North Africa, cereal production is forecast at a below-average level, reflecting reduced harvests of wheat and barley in Morocco, Algeria and Tunisia owing to dry weather conditions during the winter cropping season.

In Central Africa, cereal production is forecast to be nearly unchanged on a yearly basis and near the average, as protracted conflicts in several countries continue to limit growth in agricultural production.

Cereal production
(million tonnes)



NORTH AFRICA

Below-average cereal production in 2020

The 2020 wheat and barley harvests were completed in June in **Egypt**, **Libya** and **Morocco**, while in **Algeria** harvesting activities concluded by mid-August. Maize and rice crops in **Egypt**, grown as summer crops, will be harvested from early October.

Unfavourable rainfall in the 2019/20 agricultural season, in terms of amounts and temporal distribution, curbed production in the western part of the subregion where winter cereals are grown mostly in rainfed systems. In particular, in **Morocco**, which experienced drought conditions for most of the season and a late start of spring rains, which could have otherwise helped crops recover, total cereal production is estimated at 3.1 million tonnes, more than 40 percent lower than the previous year's already weather-stricken harvest and over 60 percent below the five-year average. Only 700 000 tonnes of barley were harvested, about one-third of the average. Production decreases compared to the previous year were also reported in **Algeria** and **Tunisia**, although more favourable rainfall distributions improved yields. Cereal production remained on par with the average in **Tunisia** and 20 percent above the average in **Algeria**. In **Libya**, where cereal production is already limited by the country's geographical conditions, the ongoing conflict has affected availability and prices of inputs, curtailing production capacities. In **Egypt**, the agricultural season proceeded smoothly and cereal production is expected at a slightly above-average level of 24.8 million tonnes, driven by an increase in the area planted with rice.

In total, the subregional 2020 aggregate cereal production is forecast at 35.2 million tonnes in 2020, almost 8 percent below the previous year and 9 percent below the average. The aggregate wheat harvest is estimated at 16.4 million tonnes, about 12 percent below the previous year and about 15 percent below average.

All countries in the subregion rely heavily on wheat imports from the international market to cover their domestic consumption needs. With a below-average 2020 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, in the 2020/21 marketing year (July/June), is estimated at 53.7 million tonnes, about 4 percent above the imported quantity of the previous year and 9 percent above the five-year average. In addition to regular imports that satisfy wheat and rice food consumption needs, many countries are likely to procure greater quantities from the international market to boost domestic stocks and improve preparedness for a possible spike in consumer demand, as happened during the initial stages of the COVID-19 pandemic in March and April 2020 when consumers stockpiled food.

Food price inflation remained at modest levels

After the increases in food price inflation rates in March and April 2020, reflecting higher prices of fresh foods resulting from increased demand, underpinned by the effects of COVID-19 lockdown measures and localized supply chain bottlenecks, prices levelled off by mid-2020 as stockpiling by consumers subsided. Government subsidies on basic foods curbed further gains.

In **Tunisia**, the food inflation rate gradually decreased from 6.2 percent in April 2020 to 4 percent in July 2020. In **Egypt**, the annual food price inflation decreased from a modest 1.4 percent in April 2020 to -1.5 percent in July 2020. Similar developments were recorded in **Morocco**, where the annual inflation rate decreased from 2.9 percent to -1 percent between April and July 2020. In June 2020 (latest available information), the food inflation rate in **Algeria** increased to 2.3 percent, up from the negative levels in May 2020. The uptick in inflation reflects reduced import quantities, as low energy prices and consequently reduced foreign exchange curbed the national capacity to import.

Food price inflation in **Libya** has been negative since late 2019 and reached -3 percent in April 2020 (the most recent inflation information available) as access to foreign currency has eased. However, in July 2020, the cost of the Minimum Expenditure Basket (MEB) increased, on average, by almost 23 percent compared to the pre-pandemic levels. Most Libyans are employed in the public sector where salaries have not been paid for months, resulting in a decreased purchasing power of the majority of the population.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
North Africa	19.2	18.7	16.4	13.1	12.8	11.6	6.5	6.7	7.2	38.8	38.2	35.2	-7.9
Algeria	3.1	4.0	3.8	1.5	2.1	1.8	0.0	0.0	0.0	4.6	6.1	5.6	-8.3
Egypt	9.0	9.0	9.0	8.8	8.5	8.6	6.5	6.7	7.2	24.3	24.1	24.8	2.5
Morocco	5.9	4.1	2.4	2.2	1.2	0.7	0.1	0.1	0.0	8.2	5.4	3.1	-42.1
Tunisia	1.1	1.5	1.0	0.5	0.9	0.5	0.0	0.0	0.0	1.6	2.4	1.5	-35.7

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

WEST AFRICA

Overall favourable prospects for 2020 cereal crops

The 2020 cropping season started on time in most countries, with the onset of rains in March in the coastal countries along the Gulf of Guinea and in June in the Sahelian countries. Harvesting of the main season maize crop was completed in August in the southern half of the subregion, including **Nigeria**, **Côte d'Ivoire**, **Benin**, **Ghana**, **Liberia** and **Togo**, while in central parts of the subregion, including southern parts of **Mali** and **Burkina Faso**, harvesting activities are underway. In the Sahel, the cereal crops are close to maturity and the harvest is expected to start in October.

Throughout most of the subregion, average seasonal rainfall has so far resulted in normal crop development and weather forecasts point to above-average rainfall until October in most countries. These conditions are expected to have a positive impact on crop yields. However, in **Côte d'Ivoire** and western **Ghana**, crops were affected by moisture deficits in June and July, while planting activities were disrupted in **Mauritania** as seasonal rains only started in mid-July, a delay of approximately two weeks. Similarly, seasonal rainfall totals in parts of **Guinea**, **Sierra Leone** and **Liberia** were below average, curbing production prospects. Although the abundant rains have had an overall beneficial impact on crops, periods of heavy rains resulted in localized flooding in July and August in **Burkina Faso, Côte d'Ivoire**, **Mali, Niger, Nigeria** and **Sierra Leone**, affecting thousands of people, causing human casualties, loss of livelihoods and damage to crops, livestock and infrastructures.

Regarding pests, Fall Armyworm (FAW) infestations were reported in most countries, which are likely to have caused localized crop losses. The desert locust situation was generally calm throughout the summer breeding areas in **Chad**, **Mali**, **Mauritania** and **Niger**, but in early 2020, surveys identified the presence of mature and immature solitary individuals and larvae. Given the favourable ecological conditions, mating and small scale breeding of desert locusts are expected to have occurred and could have resulted in crop damage. However, the prevailing poor security conditions in the aforementioned countries limits land surveys to monitor the situation and assess the impact, as well as implement control activities. Furthermore, the implementation of COVID-19 mitigation measures is reported to have reduced access to agricultural inputs and labour in several countries, affecting cropping activities and this is likely to curtail yield levels. Overall, the subregion's cereal production in 2020 is forecast at 71.8 million tonnes, about 5 percent above average but 3 percent lower than the record high harvest in 2019.

The abundant rainfall in the July-August period also boosted natural pasture conditions and contributed to the replenishment of water reserves to satisfactory levels. This, in turn, led to an improvement in body conditions of livestock, enhancing their market values. According to the July CILSS Bulletin, productivity of pasture reached about 800 kg per hectare of dry matter in some agro-pastoral areas in 2020, well above normal rates. Reflecting these conditions, the animal health situation is generally stable, with only small seasonal outbreaks of epizootic diseases, such as the Peste des Petits Ruminants (PPR) in sheep and goats and the Foot and Mouth Disease (FMD) in cattle. However, in the conflict-affected areas of Liptako-Gourma Region and Lake Chad Basin, pastoralist production systems are still affected by armed and community conflicts, theft and banditry. This situation is expected to continue to lead to a higher concentration of animals in the areas less affected by insecurity, which would result in a rapid degradation of fodder and water resources.

In Liptako-Gourma Region, Lake Chad Basin, northeast **Nigeria,** central and northern **Mali**, eastern **Niger**, northern **Burkina Faso** and Tibesti Region of **Chad**, insecurity continues to hinder agro-pastoral activities and access to fields. The conflicts severely disrupted seasonal livelihood activities and impeded households' access to food, resulting in increased humanitarian needs and food insecurity. The majority of the displaced households are heavily dependent on humanitarian assistance to satisfy their basic needs. According to the UNHCR, the rise in terrorist attacks have increased the number of IDPs in Burkina Faso, Mali and the Niger from 1.1 million people in May 2020 to over 1.5 million in August 2020.

Table 7. West Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
West Africa	48.0	52.4	50.0	20.2	21.4	21.7	68.2	73.9	71.8	-2.8
Burkina Faso	4.3	4.7	4.2	0.4	0.4	0.4	4.6	5.0	4.6	-8.7
Chad	2.5	2.7	2.5	0.3	0.3	0.3	2.8	3.0	2.8	-6.3
Ghana	2.6	3.3	2.6	0.8	1.0	1.0	3.3	4.3	3.6	-15.2
Mali	6.5	7.1	7.0	2.8	3.2	3.0	9.3	10.3	10.0	-2.5
Niger	5.7	5.5	5.8	0.1	0.1	0.1	5.8	5.7	5.9	4.1
Nigeria	19.2	21.4	20.1	8.1	8.4	8.5	27.3	29.9	28.7	-4.1

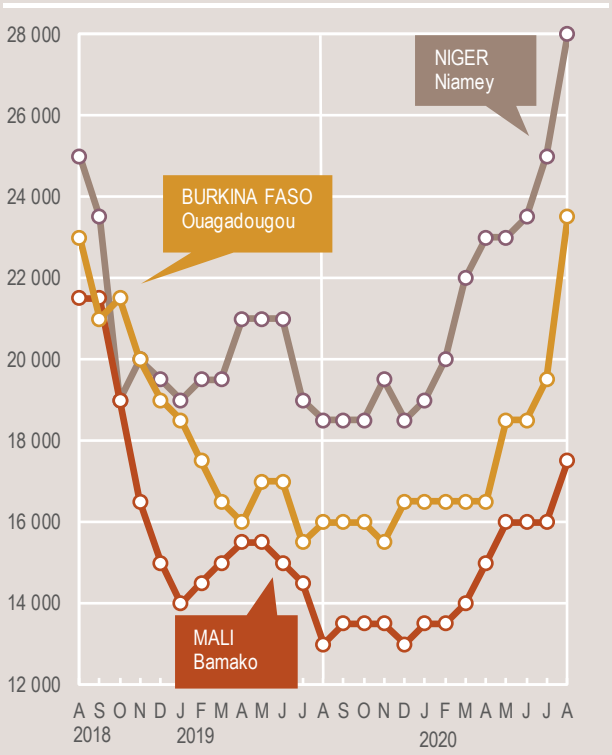
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

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

Prices of coarse grains generally stable or seasonally increased

In most countries of the subregion, the easing of the COVID-19 pandemic containment measures and satisfactory market supplies contributed to maintain stable prices of coarse grains in recent months. Nevertheless, persisting insecurity, high inflation rates and currency weakness, exacerbated by high seasonal demand, continued to drive prices up in some markets and cereal prices are, in general, well above their year-earlier levels. In the Sahelian countries of **Burkina Faso** and **Mali**, prices of coarse grains have been stable since June due to adequate domestic availabilities, government and humanitarian support and the gradual lifting of COVID-19 restrictive measures. Similarly, in **Senegal**, increased supplies from the off-season harvests from the Senegal River Valley and Matam District resulted in more stable rice prices in July compared to the beginning of the lean season in May and June. Some seasonal increases were recorded over the same period in **Chad** and **the Niger** due to the declines in cereal supplies, the persisting conflict, the poor road access during the ongoing rainy season and the closure of **Nigeria**'s borders that limits trade flows. In **Senegal**, despite the easing of some COVID-19-related restrictive measures since June, some markets are still closed, while others are operating at reduced levels due to the fear of propagation of the pandemic, resulting in tight domestic supplies and high millet and sorghum prices between May and July. In coastal countries along the Gulf of Guinea, including **Benin, Côte d'Ivoire**, **Ghana** and **Togo**, prices of maize, having increased between April and June, levelled off in July and August, reflecting adequate market supplies from the newly-harvested maize crop. In **Nigeria**, prices of coarse grains continued to rise steeply in most markets in the past few months, pressured by the effects of COVID-19 containment measures and strong domestic demand. The significant price rises were registered in the conflict-affected areas of the northeast due to prolonged civil insecurity. On a yearly basis, prices of all cereal products were at least 50 percent higher than the corresponding month last year. The continued depreciation of the national currency, the impact of the COVID-19 pandemic and border closures to curb smuggling of imported rice and maize, were the primary drivers of the high prices.

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



Source : Afrique Verte.

Food insecurity projected to remain high throughout 2020

Prior to the COVID-19 pandemic, the number of food insecure people in *West Africa* was projected to peak at 16.9 million during the lean season between June and August 2020, a 50 percent year-on-year increase and the highest number on record. The expected worsening of the food insecurity situation was based on the effects of reduced agricultural production in some areas, due to adverse weather shocks and pest attacks, and persisting insecurity. Moreover, low food supplies in some areas, limited coping mechanisms available to households due to recurrent shocks and the low levels of food assistance, were additional factors underpinning the food insecurity projections. However, the current situation is expected to worsen than initially projected on account of the impact from the COVID-19 pandemic, including the containment measures that sought to sustain health conditions but concurrently adversely affected households' livelihoods and incomes. The highest prevalence of food insecurity was estimated in **Burkina Faso**, **Chad**, **Mali**, **the Niger** and **Nigeria**. In **Burkina Faso**, according to the updated "Cadre Harmonisé" results released by the Government, about 3.3 million people were estimated to be in need of external food assistance during the June-August 2020 period, well above the 687 000 food insecure people that were estimated for the same period in 2019. This increase was mainly due to the deterioration of the security situation in the Centre-Nord and Sahel regions. Insecurity incidents continued to result in massive population displacements, compromising humanitarian operations and access to the most affected areas, where needs are greatest. The situation is exacerbated by a degradation of road structures during the ongoing rainy season and the impact of the COVID-19 pandemic on households' ability to earn income. In **Chad**, after the revision of the humanitarian response plan due to the COVID-19 pandemic, 5.9 million people were estimated to be severely food insecure in August 2020, the peak of the lean season. The food insecure estimate is about 28 percent higher on a yearly basis, on account of recurrent security attacks and incursions by armed groups in Lac and Tibesti regions since early 2020, which have disrupted livelihoods and caused population displacements. The situation was compounded by localized flooding in July and August. In **Mali**, talks aimed at resolving the political crisis following the *coup d'État* on 18 August 2020 continued later into September, and the fragile situation is an additional factor that could further stress food security conditions. According to OCHA, about 6.8 million people were estimated to be severely food insecure in August 2020 (one-third of the

population), about 60 percent more than the estimated number in January 2020, representing the highest number of people in need since 2012. The areas with the highest levels of food insecurity include the Liptako Gourma, Mopti and Menaka regions due to the escalation of the conflict, combined with the impacts of the COVID-19 pandemic and weather shocks (droughts and floods); according to local authorities, over 26 000 people have been affected by floods, including 5 400 IDPs. In **Niger**, according to the COVID-19 pandemic multi-institutional assessment, carried out in April 2020, it is estimated that 5.6 million people face a food crisis, including 2.7 million in severe food insecurity. Persisting conflicts and renewed violence by armed groups since the beginning of 2020 have triggered new population displacements and restricted access to basic services in Diffa, Tahoua and Tillabery regions. In **Nigeria**, 7 million people were estimated to be severely food insecure during the lean season between June and August 2020. This figure is about 40 percent higher than the previous year's level, driven by localized cereal production shortfalls, an escalation of armed and community conflicts, and the high inflation rates, further exacerbated by the impacts of the COVID-19 pandemic. The areas most affected by food insecurity are Borno and Yobe states where over 2 million people are food insecure. In addition, repeated attacks by armed groups in northwestern and central states have contributed to an increase in population displacements. Most displaced households have limited income and heavily rely on humanitarian assistance whose access is often limited by persisting insecurity.

CENTRAL AFRICA

Ongoing conflicts expected to curtail agricultural production in 2020

In the uni-modal rainfall northern areas of **Cameroon** and **the Central African Republic**, harvesting of the 2020 millet and sorghum crops is expected to begin in late September and rainfall amounts have been generally adequate since the onset of the season in May, benefitting crop development. In central and southern areas of both countries, harvesting of the 2020 main maize crops started in mid-August and is currently ongoing under overall favourable weather conditions. In **Cameroon**, heavy rainfall in July and August resulted in localized flooding in central and northern regions, damaging standing crops.

Harvesting of the 2020 main maize crop is expected to begin in October in the northern provinces of **the Democratic Republic of the Congo** and production prospects are favourable as overall adequate and well-distributed precipitation during the season resulted in generally good crop conditions. In the central provinces, planting of the 2020 main season maize crops started in July under overall favourable weather conditions, except in South Kivu Province, where heavy rains in mid-April caused localized flooding and disrupted land preparation activities. In addition, in eastern regions, an escalation of violence since June 2020 resulted in the displacement of about 367 000 people, hampering agricultural operations in some areas. In the southernmost uni-modal rainfall areas, harvesting of the 2020 maize crops finalized in June and the output is estimated at below-average levels, mainly due to persistent FAW infestations.

Planting of the 2020 main maize crop is ongoing in **the Republic of the Congo** and **Gabon** and crops are expected to be harvested from December.

The 2020 subregional cereal output is expected at levels near the average of the last five years, amid generally favourable seasonal rains. However, persisting conflicts and displacements, coupled with movement restrictions related to COVID-19 prevention measures, are expected to continue limiting farmers' access to crop growing areas and agricultural inputs, resulting in an output below the pre-conflicts levels.

Prices of staple foods at high levels

Prices of staple foods continued to increase in the third quarter of 2020 and remained higher than in the corresponding period in 2019. In **the Central African Republic**, staple food prices, which reached atypically high levels in April 2020 following the outbreak of the COVID-19 pandemic, increased further in the following months. In August, they were well above their year-earlier levels as insecurity continued to cause disruptions in supply and trade,

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Central Africa	5.5	5.6	5.5	0.7	0.7	0.7	6.2	6.3	6.2	-1.3
Cameroon	3.2	3.3	3.2	0.3	0.4	0.4	3.5	3.6	3.5	-2.1
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.2	0.1	-7.4
Democratic Republic of the Congo	2.1	2.1	2.1	0.3	0.3	0.3	2.4	2.4	2.4	0.4

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

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

and due to movement restrictions and border controls, which, despite having been gradually removed, continued to impede transportation movements domestically and across borders since the outbreak of the virus. Prices of imported products such as rice, reached levels up to 70 percent higher than a year earlier in August 2020. Similarly, prices of locally produced goods such as maize, cassava and sorghum, were 30 to 50 percent above those in August 2019. In **the Democratic Republic of the Congo**, prices of imported foods increased strongly between April and July 2020. Reduced cash crop exports, due to subdued international demand and disruptions to logistical services owing to the impact of the COVID-19 pandemic, resulted in a decrease of foreign exchange earnings, triggering a depreciation of the Franc Congolais and resulting in imported inflation. In July, maize prices in Kinshasa were reported to be nearly 80 percent higher than their levels in February 2020. In **Cameroon**, prices of staple foods have been at higher levels in 2020 in urban centres compared to the previous year, due to low market supplies amid a slowdown in domestic trade. In addition, ongoing conflicts and closure of the borders to contain the spread of the COVID-19 virus disrupted international trade flows, causing a drop in imports of products such as rice and vegetable oil, prices of which remained at elevated levels. Prices of locally produced foods also increased; for instance, maize and sorghum prices rose by over 20 percent between May and August, reaching levels about 40 percent higher than in August 2019.

Restrictive measures related to COVID-19 worsened the already dire food insecurity situation

In the third quarter of 2020, the aggregate number of severely food insecure people in the subregion is estimated at 29.1 million (excluding the Republic of the Congo, Gabon and Equatorial Guinea), an increase of over 40 percent compared to the same period a year before and well above earlier expectations prior to the COVID-19 pandemic. The restrictive measures put in place by the governments from March 2020 hampered people movements to fields, slowed down trade in food and triggered price increases, thus limiting access to food for the most vulnerable households. In addition, the conflicts continued to cause population displacements, causing widespread disruption of agricultural and marketing activities, and consequently severely impacting food availability and access.

The largest increase in the number of food insecure people was estimated in **the Democratic Republic of the Congo**. Despite the end of the state of emergency on 22 July and the easing of some COVID-19-related regulations, continued restrictions on the movement of people within the country have had adverse effects on livelihoods. In addition, the pandemic had a severe impact on the economy and particularly on the informal sector, which employs more than 70 percent of the working population. The loss of income for informal workers, the unavailability of sufficient Government social protection measures and the high level of prices have combined to drastically reduce households' access to food in the third quarter of 2020. According to the latest IPC analysis, carried out in July 2020, 21.8 million people (over 30 percent of the analyzed population) were estimated to be severely food insecure, 60 percent above the figure that was projected by the previous IPC analysis, carried out prior to the COVID-19 pandemic.

In **the Central African Republic**, the number of severely food insecure people during the lean season between May and August 2020 is estimated at 2.4 million (51 percent of the analyzed population). It represents a 15 percent increase compared to the forecast prior to the COVID-19 pandemic and a 30 percent increase compared to the same period a year before. The increase in food insecurity is mainly the result of high food prices, limiting access to food for the most vulnerable households, the resurgence of violence between armed groups and the persistence of inter-community conflicts in some areas of Haute-Kotto, Vakaga, Nana-Grebizi and Bamingui-Bangoran prefectures, which led to significant population movements since January 2020. In **Cameroon**, the latest "Cadre Harmonisé" analysis (March 2020) projected that 2.1 million people were expected to face severe acute food insecurity during the June-August 2020 period. However, according to the more recent analysis conducted by FAO, WFP and the Ministry of Agriculture and Rural Development, about 4.9 million people (18 percent of the total population) are currently estimated to be in severe acute food insecurity, more than double the projected figure, as a result of the additional effects of the COVID-19 pandemic. About 1.5 million people, who are estimated to be food insecure, are located in Northwest and Southwest Anglophone regions, where fighting is still ongoing between the security forces and separatist armed groups. The security situation is also precarious in Far North Region, where incursions of Boko Haram almost doubled in the first seven months of 2020, compared to the same period a year before, and triggered new population displacements.

EAST AFRICA

Overall favourable prospects for 2020 main season crops despite localized production losses due to floods

In **Burundi**, **Rwanda**, southeastern **Kenya**, central and southern **Somalia**, **the United Republic of Tanzania**, **Uganda** and southern **South Sudan**, harvesting of the 2020 main season cereal crops was recently completed. The March to May rainy season was characterized by exceptionally high precipitation amounts that boosted cereal yields, resulting in above-average first season cereal outputs in most countries in 2020. However, the heavy rains also triggered widespread flash floods resulting in losses of lives, population displacements, livestock deaths and localized shortfalls in crop production. In southern bi-modal rainfall areas of Greater Equatoria Region of **South Sudan**, yields of first season crops benefited from adequate rains, while the planted area increased compared to the previous year due to an improved security situation. As a result, cereal production is expected to be higher than in the previous year, but still below the pre-conflict levels. By contrast, in the main cropping areas of southern **Somalia**, cereal production prospects for the main 2020 "Gu" season are unfavourable. An early onset of seasonal rains in late March, followed by exceptionally heavy precipitation until early May, caused severe flash flooding and river overflows, which submerged more than 54 000 hectares of crop land, about 20 percent of the average planted area. Subsequently, dry weather conditions prevailed for the remainder of the rainy season until late June and resulted in the wilting of crops and poor germination of replanted crops. The erratic rainfall pattern facilitated an atypically high incidence of pests, including crickets and stalk borers, which further reduced yields, while persisting insecurity continued to hinder agricultural activities. Although above-average "Hagaa" coastal rains in July led to a partial recovery in vegetation conditions, the heavier rains also caused floods and crop losses. Overall, cereal production was significantly below average and in the flood-affected riverine areas, particularly maize production, is expected to be minimal.

In northern parts of the subregion, including central and western **Kenya**, the northeastern Karamoja Region in **Uganda**, **Ethiopia**, **Eritrea**, **the Sudan** and central and northern **South Sudan**, the main season cereal crops for harvest from October, are at vegetative or maturing stages. Above-average seasonal rains have benefited vegetation conditions and boosted yield prospects, but also caused widespread floods that resulted in localized losses of standing crops and livestock. In the key growing areas of Rift Valley and Western provinces of **Kenya**, seasonal rains had an early onset and heavy precipitation in February disrupted land preparation and sowing activities. However, abundant and well-distributed rains throughout the growing period were favourable for crop development and, according to official estimates, national "long-rains" maize production is expected to be 10-15 percent above average. In **the Sudan**, above-average seasonal rains had a beneficial impact on vegetation conditions. However, plantings have been delayed and the extent of the area sown was curtailed by shortages and high prices of fuel and agricultural inputs due to persisting macro-economic challenges. Although agricultural labour availability was affected by movement restrictions related to the COVID-19 pandemic, improvements were reported in August following the relaxation of some restrictive measures. Similarly, in **Ethiopia**, the 2020 "Meher" crops benefited from above-average precipitation, but labour shortages due to COVID-19-related movement restrictions led to a reduction in the planted area in some parts. In northern and central uni-modal rainfall areas of **South Sudan**, the planted area increased in most states due to an improved security situation. However, in some areas of Warrap, Lakes and Jonglei states, the escalation of inter-communal violence since early 2020 disrupted agricultural operations. In **Eritrea**, the 2020 "Kiremti" rainy season, which normally extends from late June to September, has been characterized by an early onset followed by below-average precipitation amounts from late June until late July, which had a negative impact on vegetation conditions. Subsequently, heavy rains diminished seasonal rainfall deficits and led to an improvement in vegetation conditions, lifting crop prospects, especially in Gash Barka Region, which normally accounts for more than half of the domestic cereal production. In agro-pastoral areas of Karamoja Region of **Uganda**, the

Table 9. East Africa cereal production

(million tonnes)

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

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

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

cereal harvest started in September, one month later than normal, and the output of sorghum, the main cereal grown in the area, is estimated at a below-average level as waterlogging, due to excessive early season rains, and seed shortages resulted in delayed and reduced plantings.

The severe desert locust outbreak that began in late 2019 continues to threaten rural livelihoods. The most affected areas are central and northern **Somalia**, northern **Kenya** and **Ethiopia**. Following prevailing winds, a limited number of spring-bred swarms migrated from northwestern Kenya to Ethiopia during July and August. A few swarms also crossed into adjacent areas of northeastern **Uganda** and southeastern **South Sudan**. Large-scale aerial and ground control operations carried out by the governments, with the support of FAO, have mitigated the impact of the locusts on pastures and crops. These operations, in combination with weather conditions, reduced any large scale migration from Kenya to the summer breeding areas in **the Sudan** and *West Africa*. In **Ethiopia**, locusts attacked the secondary season "Belg" crops, gathered in June in central and eastern areas, but large-scale control operations have averted widespread losses. In June, locusts migrated from southern areas to summer breeding areas in northern Afar, Amhara and Tigray states, which also received several swarms from Yemen. These areas, where "Meher" crops are currently being grown, may become the epicentre of the infestation in the subregion and control operations need to be substantially scaled up to avoid major crop losses.

In pastoral and agro-pastoral areas of northern and eastern **Kenya**, southeastern **Ethiopia** and central and northern **Somalia**, seasonally dry conditions prevail. Vegetation conditions are generally above average as abundant rains during the March to May rainy season substantially regenerated rangeland resources and resulted in a slower-than-normal depletion during the ongoing dry season. The abundant pasture availability resulted in marked improvements in livestock body conditions that, despite the current seasonal decline, are still good. Herd sizes are gradually increasing, but they have not yet fully recovered from the substantial livestock losses incurred during the 2017 drought. So far, pasture losses due to locusts have been localized as control measures and the regeneration of rangeland resources fostered by the abundant seasonal rains, prevented widespread damages. However, as locust reproduction continues, sustained surveillance and control activities are required.

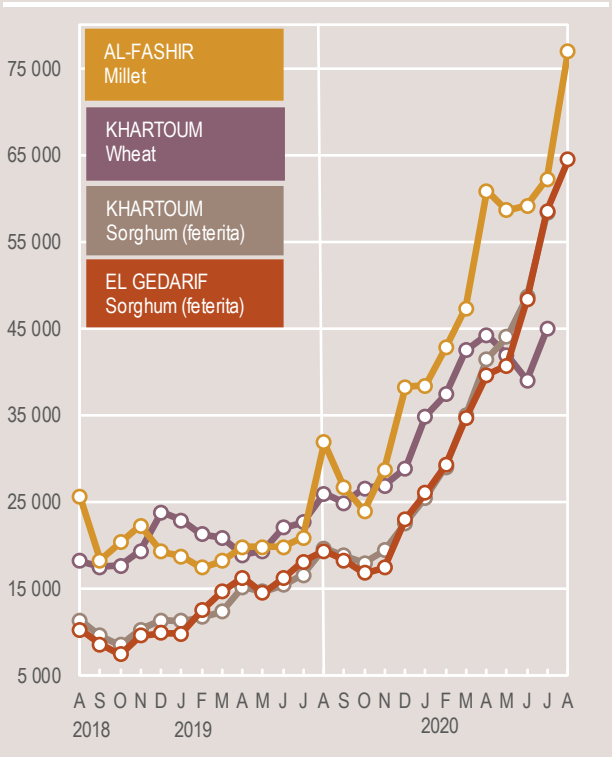
According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the October to December rains are likely to be below average and delayed by up to one month over most of the subregion, an outlook that curbs production prospects of 2020 second season crops and could undermine pastoral livelihoods. In agro-pastoral and pastoral areas, which have been affected by the locust outbreak, the expected dry weather conditions are likely to hinder insect reproduction. However, pasture losses due to adult swarms could still be substantial, as the forecast poor rains will not allow an adequate regeneration of vegetation and, as a result, this could cause increased competition between locusts and grazing animals for the limited resources. Sustained control efforts are, therefore, needed.

Prices of cereals at exceptionally high levels in the Sudan and South Sudan

In several countries, cereal prices declined below their year-earlier levels, following above-average first season harvests. By contrast, prices reached new record highs in **the Sudan**, and in **South Sudan**, despite some recent declines, they remained at exceptionally high levels.

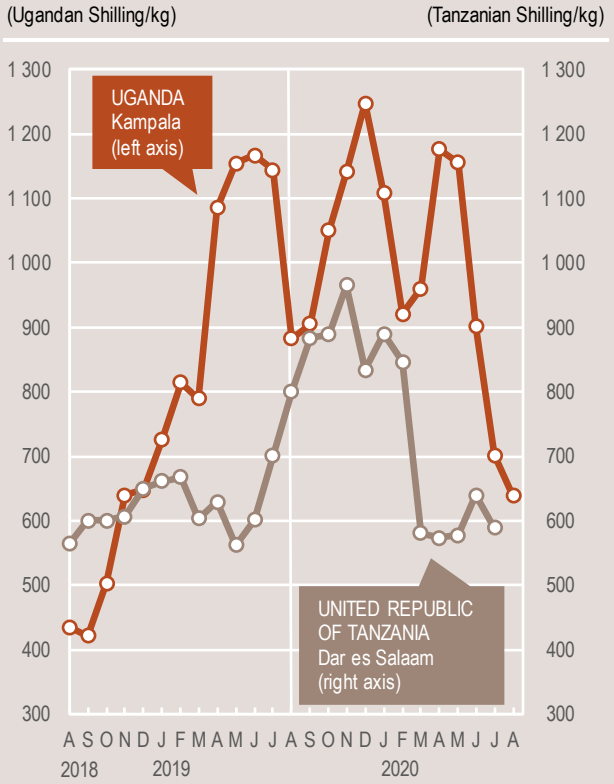
In **the Sudan**, prices of sorghum and millet continued the sustained upward trend which started in late 2017, increasing by 30 to 60 percent between May and August, when they reached record highs. The high level was mainly driven by a reduced 2019 cereal output, trade disruptions due to COVID-19-related restrictive measures and currency weakness. In **Somalia**, prices of maize and sorghum remained firm or continued to increase between May and July due to the poor performance of the "Gu" main season harvest and the flood-related trade disruptions. Prices in July were 20 to 30 percent higher on a yearly basis. In **South Sudan**, prices of maize and sorghum declined by about 10 percent between May and August in the capital, Juba, as the first season harvest increased market availabilities. However, prices remained about 60 percent above the already exceptionally high levels of the previous year, having surged in the first half of 2020 as COVID-19 screening measures at border points in Uganda, the country's main source for cereals, slowed trade. Cereal prices were also supported by inadequate domestic supplies, a difficult macro-economic situation and the lingering impact of the prolonged conflict. In **Uganda**, prices of maize sharply declined in recent months, decreasing by about 50 percent between May and August in all monitored markets, as the newly harvested first season crops increased supplies. The COVID-19-related restrictions exerted further downward pressure on prices, as demand by restaurants, hotels, schools and urban households was constrained by a lower economic activity and declines in incomes, and exports to Kenya decreased due to screening measures at border crossing points and business uncertainty. Following the recent declines, prices of maize in August were up to 40 percent lower than one year earlier. In **Kenya**, prices of maize declined by about 10 percent between June and August in Nakuru and Eldoret markets, located in western key-producing areas, as traders released stocks ahead of the upcoming "long-rains" harvest. By contrast, prices slightly increased in the capital,

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



Source: Food Security information for Action (SIFSIA).

Maize prices in selected East African markets



Sources : Regional Agricultural Trade Intelligence Network.

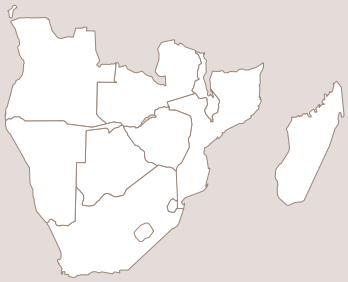
Nairobi, between July and August, due to persisting supply chain disruptions linked to the COVID-19 pandemic. Overall, prices of maize in August were 10 to 20 percent lower than their year-earlier levels. Similarly, in **the United Republic of Tanzania**, maize prices declined by about 10 percent between June and July with the "Masika" harvest and in July were about 15 percent lower on a yearly basis.

Food security situation sharply deteriorates in Ethiopia, Somalia and the Sudan due to the impact of the COVID-19 pandemic

The aggregate number of people in need of humanitarian assistance in the subregion is estimated at about 31 million, mainly located in **Ethiopia**, **South Sudan** and **the Sudan**. This figure is 30 percent higher than in late 2019 and the highest on record in recent years, having surpassed the levels of food insecurity recorded during the severe and prolonged drought in 2016 and 2017. The deterioration of the food security situation is mainly driven by the impact on livelihoods of the restrictive measures implemented to contain the COVID-19 pandemic. In some countries, food security assessments were conducted prior to the COVID-19 pandemic, and the current situation is likely to be worse than initially estimated. Movement restrictions have impaired domestic and cross-border trade of food commodities, resulting in reduced market availability and increasing prices of food, also constraining labour opportunities, especially in urban areas, with adverse consequence for households' purchasing power. In addition, the global economic slowdown has caused a sharp decline in remittances, while reduced sales and exports of livestock have affected incomes of pastoralist households. Despite the recent phasing out of some restrictive measures, the economic recovery is likely to be slow.

In **Ethiopia**, about 8.5 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between July and September 2020. About 80 percent of the food insecure people are located in SNNP, Eastern Oromia and Somali regions, due to a below-average "Belg" harvest, localized crop and pasture losses due to locusts, the negative impact of the COVID-19 pandemic and recent floods, against a backdrop of reduced household resilience following recurrent climatic shocks. In **Somalia**, about 3.5 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between July and September 2020. This figure represents almost 30 percent of the total population and is more than three times the estimate of the food insecure people at the beginning of 2020. The worsening food insecurity situation is driven by multiple shocks, including the desert locust outbreak, widespread floods since October 2019 and the COVID-19 pandemic. The areas with the highest prevalence of food insecurity are southern flood-affected riverine areas, urban IDP settlements, parts of southern Bay and Bakool regions, of central Mudug and Galgaduud regions, and of northern Sanaag, Bari and Woqooyi Galbeed regions. In **the Sudan**, 9.6 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between June and September 2020. This figure is about 65 percent higher on a yearly basis and accounts for more than 20 percent of the total population. The current alarming food insecurity conditions are driven by low cereal supplies, soaring food prices, high inflation and the impacts of the COVID-19 pandemic. The areas most affected by food insecurity are South Kordofan and Blue Nile states, and most of the greater Darfur Region, where 30 to 40 percent of the population is food insecure. In **South Sudan**, about 6.5 million people (55 percent of the total population) were projected in early 2020 to face Phase 3: "Crisis" or worse levels of acute food insecurity during the May-July 2020 period. However, this projection was conducted prior to the COVID-19 pandemic and the recent escalation of inter-communal violence. As a result, the current severity and prevalence of food insecurity is likely to be substantially higher.

SOUTHERN AFRICA



Expectations of above-average rainfall for 2020/21 cropping season

Planting of the 2021 cereal crops, to be harvested next year, is expected to begin in October. Weather forecasts indicate a higher probability of above-normal rainfall between October 2020 and February 2021 across most of the subregion, underpinned by the likely development of La Niña in late 2020, which is typically associated with heavier rainfall in the subregion. This forecast supports a generally favourable production outlook for the 2021 cereal crops, although the possibility of flooding and associated crop damage also increases. Notwithstanding the expected positive effects of higher rainfall amounts, the impact of the COVID-19 pandemic, primarily channelled through reduced incomes, could curb plantings of the 2021 crops as farming households struggle to purchase sufficient agricultural inputs. In addition, labour availability might be adversely affected due to both the direct health impact of the virus and related movement restrictions. Further risks to production in 2021 are the bands of African migratory locusts and red locust hoppers, which were reported in **Angola**, **Botswana**, **Namibia**, **Zambia** and **Zimbabwe**. National governments, with support from FAO, are monitoring the situation and implementing containment and mitigation measures.

Production of cereals rebounds strongly in 2020

Production of staple cereals in 2020 was largely unaffected by the COVID-19 pandemic as the main harvest was underway prior to the implementation of containment measures. Most governments also exempted the agriculture sector from the COVID-19 regulations which allowed operations to continue largely unhindered. In total, including the winter cereal crops that are currently being harvested, production is forecast at an above-average level of 37.4 million tonnes. This level is a significant rebound compared to the weather-affected outturn in 2019 and reflects the abundant rainfall in the second half of the season that raised crop yields and led to an increase in the harvested area.

The bulk of the subregional production increase reflects a large output in **South Africa**, the main producer in the subregion, where maize production is estimated at 16.1 million tonnes in 2020, the second largest harvest on record. Current expectations also point to an above-average production of the winter wheat crop to be harvested from September as a result of favourable weather in recent months that boosted yields. Above-average maize harvests were also gathered in **Malawi** and **Zambia**, although shortfalls in production were recorded in southern areas of both countries for a second consecutive year. A large output was estimated in **Namibia** as conducive seasonal rains instigated an increase in plantings and raised yields to above-average levels. Similarly, but to a lesser extent, production upturns were estimated in **Angola**, **Botswana** and **Lesotho**. Cereal outputs in **Madagascar** and **Mozambique** are estimated to have remained stable on a yearly basis, owing to adverse weather conditions that contained yields, nonetheless, the national harvests slightly exceeded the five-year averages. In **Zimbabwe**, production of maize was estimated at under 1 million tonnes, approximately 25 percent below the five-year average although higher than the previous year's low outturn. The reduced output is primarily the result of low crop yields, owing to rainfall shortages and a contraction in the planted area, reflecting limited access to mostly imported agricultural inputs amid continuing economic challenges.

Large domestic harvests reduced import needs

Reflecting the bumper output in 2020, most countries' import needs have fallen and concurrently the ample harvests in the two main exporters, **South Africa** and **Zambia**, have boosted export availabilities, auguring well for importers from a supply perspective. In total, the subregional cereal import requirements are estimated at a below-average level of 9.1 million tonnes in the 2020/21 marketing year (generally April/March). The bulk of this quantity is made up of wheat grain, produced in limited quantities in *Southern Africa*, and the remaining amount is comprised of rice (milled) and maize grain, the key food staple.

The aggregate import requirement for maize is estimated at 1.9 million tonnes in 2020/21, 25 percent below the five-year

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Southern Africa	2.0	1.8	2.3	25.1	23.9	30.6	4.2	4.5	4.4	31.3	30.1	37.4	23.9
excl. South Africa	0.3	0.3	0.3	12.4	11.5	13.9	4.2	4.5	4.4	16.8	16.3	18.7	15.0
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.6	3.9	3.7	3.8	4.1	3.9	-5.0
Malawi	0.0	0.0	0.0	3.1	3.6	3.9	0.1	0.1	0.1	3.2	3.7	4.0	8.9
Mozambique	0.0	0.0	0.0	2.2	2.5	2.5	0.4	0.3	0.5	2.7	2.8	3.0	4.5
South Africa	1.7	1.5	2.0	12.8	12.3	16.7	0.0	0.0	0.0	14.4	13.9	18.6	34.4
Zambia	0.2	0.2	0.2	2.8	2.1	3.5	0.0	0.0	0.0	3.0	2.3	3.7	62.5
Zimbabwe	0.1	0.1	0.1	1.3	0.9	1.1	0.0	0.0	0.0	1.4	1.0	1.2	23.4

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

average and a decline compared to the previous year. The bulk of this volume is forecast to be shipped to **Zimbabwe**, where a second consecutive below-average output and minimal stocks raised import requirements sharply. The steep depreciation of the Zimbabwean currency, exacerbated by the impact of the COVID-19 pandemic, has increased imports costs and, therefore, raised concerns about the national capacity to buy grain supplies on the international market. Similarly, several other importing countries have also recorded currency depreciations and, whilst the availability of grain supplies remains satisfactory, the rising import costs present access challenges.

Prices of maize began to rise

In **South Africa**, prices of maize increased in the July-August period, having fallen in the preceding months on the back-harvest pressure. The recent increases largely stem from robust export demand, particularly for yellow maize from East Asian countries, while significant purchases of white maize from Zimbabwe added to the upward pressure. On a yearly basis, maize prices were at comparable levels as of August 2020. Similarly, prices of wheat climbed higher in recent months, but at a slower monthly rate in August as the market responded to an upturn in domestic production prospects. Reflecting the ample domestic supplies, prices of maize grain declined sharply in **Zambia**, but were still higher on a yearly basis as of July, partly owing to inflationary pressure from a weak currency. In **Malawi**, prices of maize grain also fell sharply in the first half of 2020, but levelled off in June and July, and were lower than their year-earlier levels. Food prices in **Zimbabwe** continued to rise abruptly and the annual inflation rate was at approximately 840 percent in July. The exceptionally high prices mainly result from tight food supplies and severe macro-economic instability, particularly related to the weak value of the country's currency. In the import-dependent countries of **Botswana** and **Eswatini**, prices of maize meal rose modestly in June and July, and are expected to come under further pressure due to the increasing prices in South Africa, the main source of grains of these countries.

Impact of COVID-19 pandemic sustains high food insecurity levels

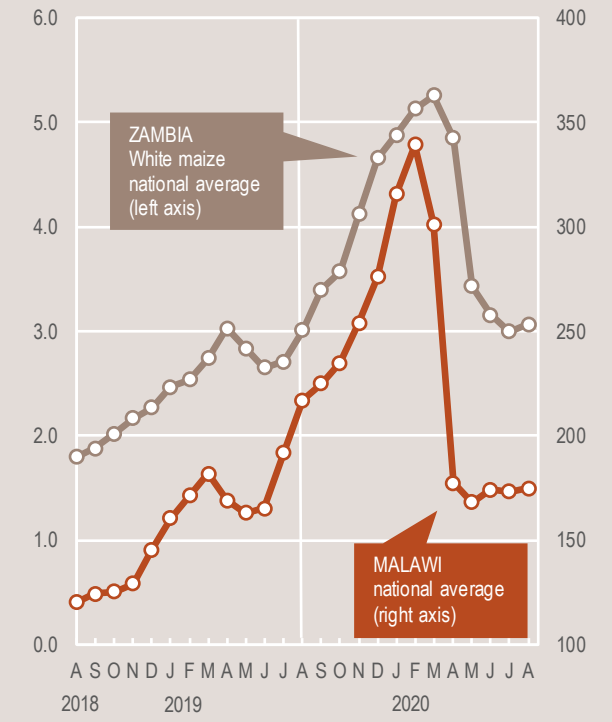
The impact of the COVID-19 pandemic has severely stressed food security conditions throughout the subregion as income and job losses due to COVID-19-induced economic slowdowns and recessions have constrained households' capacity to access food, particularly for the urban poor. In parallel, food security assessments have not been conducted in the same manner and within the same time period as in previous years due to movement restrictions and, therefore, the current figures do not fully capture the comprehensiveness of the pandemic's impact on food security.

Most countries in the subregion, barring **Malawi** and **Mozambique**, are forecast to experience economic recessions in 2020, with the largest economic decline forecast in **Zimbabwe**. The slowdown in economic activities has translated into job and income losses and this portends to an increase in poverty across the subregion. Furthermore, remittances are forecast to fall in 2020, further diminishing households' capability to purchase food. Remittances are a particularly important source of foreign currency supplies and household incomes in **Lesotho**, **Madagascar** and **Zimbabwe**.

Partly countering these negatives stressors, the large domestic harvests in 2020 boosted food availability and farmers' incomes from increased crop sales, helping to stabilize and, in some cases, improve the food security situation of rural households, particularly when compared to the previous year. In addition, the sharp seasonal price declines have partly alleviated the effects of reduced incomes in earlier months. However, prices of staple foods are likely to increase in the remainder of 2020, underpinned by currency weakness in several countries.

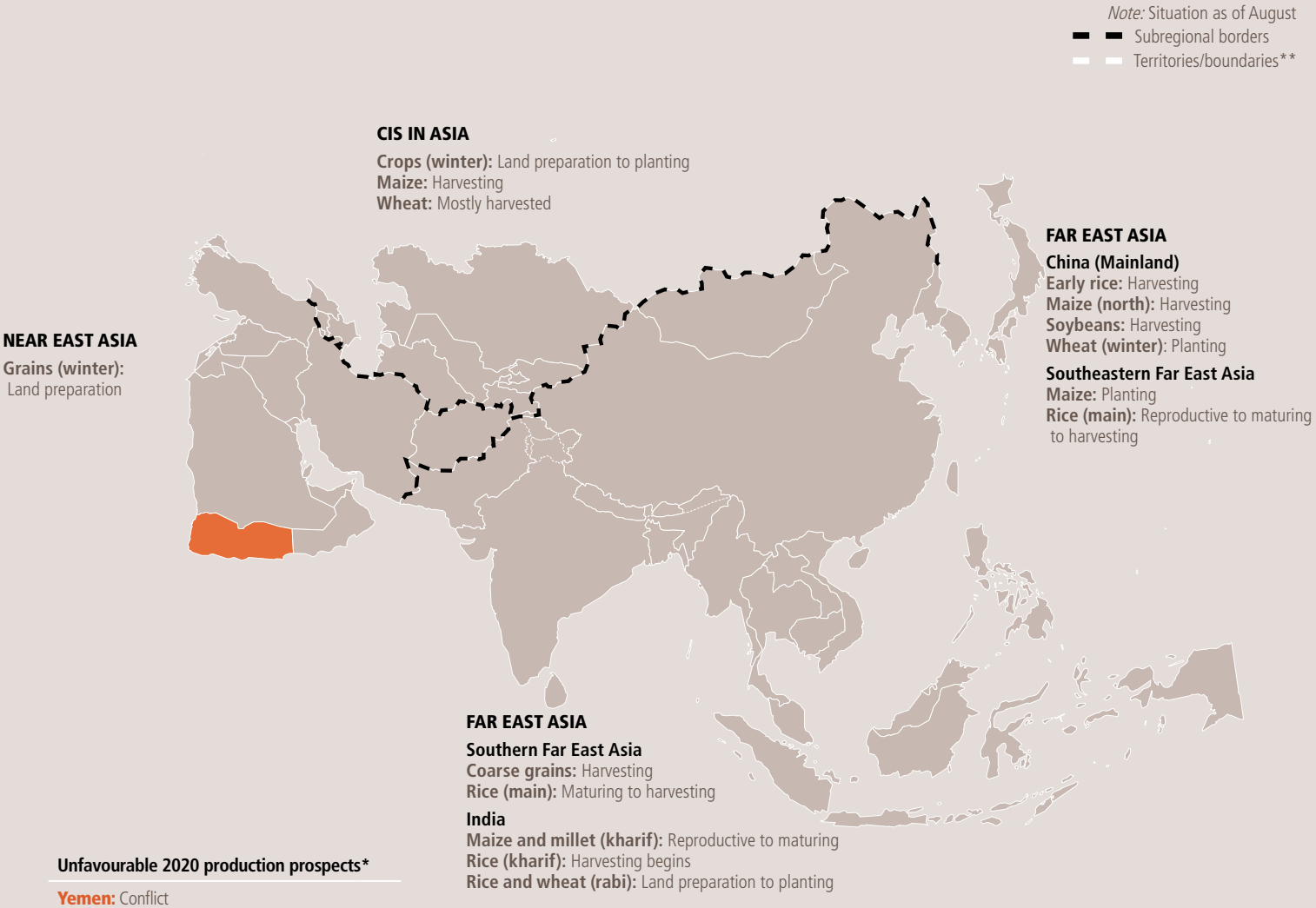
The aggregate estimate of the food insecure people in the subregion is not yet available for the 2020/21 period. However, based on some of the currently available assessments, the number of people in need of assistance is expected to rise above the peak figure of 13.8 million estimated in 2019/20.

Maize prices in selected Southern African markets



Sources : Central Statistical Office, Zambia; Ministry of Agriculture and Food Security, Malawi.

REGIONAL REVIEWS
ASIA



Unfavourable 2020 production prospects*

Yemen: Conflict

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

Source: GIEWS

Asia Production Overview

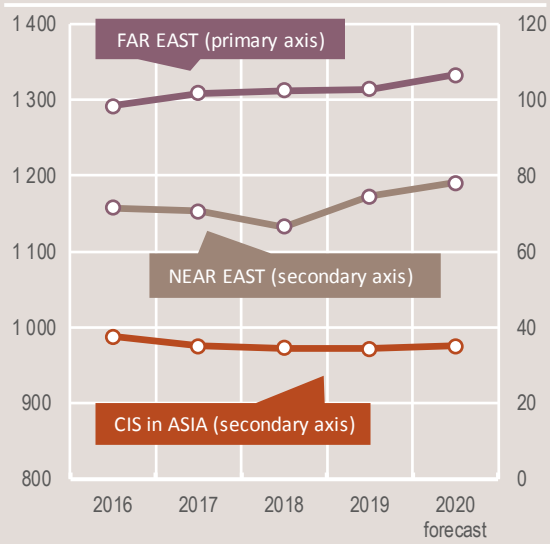
The aggregate 2020 cereal production is forecast at 1 446 million tonnes, a yearly increase of 23 million tonnes and 3 percent above the five-year average, reflecting production gains in all subregions.

In the Far East, the aggregate cereal output in 2020 is set to reach an all-time high, driven by large harvests in India, Thailand and Pakistan. Abundant rains supported these production increases but also triggered floods in Northern Hemisphere countries, causing crop losses.

In the Near East, harvesting of the spring crops is underway or about to start and aggregate production, including the already harvested winter crops, is anticipated at an above-average level, reflecting good outputs in the Syrian Arab Republic, Iraq, Turkey and Saudi Arabia supported by conducive weather and improved security conditions.

In CIS in Asia, harvesting of the spring crops is underway and aggregate production is forecast to increase from last year's low outturn to a near-average level, mainly reflecting large wheat and barley harvests.

Cereal production
(million tonnes)



FAR EAST

Near-record cereal output expected in 2020

In the Northern Hemisphere, harvesting of the 2020 main season rainfed crops, mostly rice and coarse grains, is about to begin and the secondary season crops will be planted towards the end of the year. Countries along or south of the Equator, including **Indonesia**, **Sri Lanka** and **Timor-Leste** as well as **Viet Nam,** have harvested the 2020 main season crops in the first part of the year and are currently engaged in gathering the secondary season crops. No major delays in agricultural activities were reported due to movement restrictions and lockdowns related to the COVID-19 pandemic in many countries.

The 2020 monsoon season, which generally stretches from June to September, started on time in early June. Floods occurred in parts of **Bangladesh**, **the Democratic People's Republic of Korea**, **India, Nepal** and **Pakistan**, causing loss of lives, large population displacements and damage to housing and infrastructure, but had minimal impacts on standing crops. Overall, the current rainy season has been beneficial for cereal crops and underpinned the favourable production outlook.

Production of paddy rice, the major staple in the subregion, is preliminarily forecast at 679.5 million tonnes in 2020, 1.3 percent above last year's above-average level. The production outlook mostly reflects expectations of area increases, owing to remunerative producer prices and continued Government support programmes that promote rice production. Near-average or above-average outputs are forecast in **Bangladesh**, **Cambodia**, **India**, **Myanmar**, **the Philippines**, **Pakistan**, **Sri Lanka** and **Thailand**. By contrast, a below-average output is forecast in **the Republic of Korea**, owing to continued area contractions. Similarly, in **Indonesia**, the 2020 paddy production is forecast at a below-average level due to dry weather conditions at the end of 2019 and beginning of 2020, which affected the main season crops at the early development stages. In **the Democratic People's Republic of Korea**, excessive rains caused severe flooding in key cereal producing areas in the southern agricultural areas of the country. No detailed information on the extent of the damage is yet available, the recently conducted assessments are expected to provide more information. In **China (mainland)**, paddy output is forecast close to the five-year average at 210.5 million tonnes, as the area sown is forecast to increase.

The 2020 subregional production of coarse grains, mostly maize, is forecast at 380.5 million tonnes, close to the previous year's high level. In most countries, the main season cereal harvests are expected at bumper levels, reflecting an expansion in the area sown, driven by the robust demand by the feed industry and expectations of above-average yields as farmers increased the use of high-yielding seed varieties. The 2020 secondary season crops will be planted towards the end of the year and the area sown is expected to remain at high levels, due to strong local demand. The only exception to this outlook is **Viet Nam**, where the 2020 maize output is forecast below the five-year average, mostly reflecting a reduction in the area planted as farmers decided to increase the cultivation of horticulture crops instead of maize.

The 2020 wheat harvest was finalized in June 2020. Based on official data, the 2020 subregion's aggregate wheat production is estimated at a record of 272.5 million tonnes, reflecting above-average precipitation and adequate supply of agricultural inputs and irrigation water. In particular, in **India**, the final official estimates put the 2020 wheat

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Far East	259.4	267.3	272.5	372.9	375.4	380.5	667.9	671.0	679.5	1300.2	1313.7	1332.4	1.4
Bangladesh	1.2	1.0	1.3	2.9	3.6	3.8	53.3	55.4	55.2	57.5	60.0	60.3	0.5
Cambodia	0.0	0.0	0.0	0.9	0.9	1.0	10.3	10.9	11.1	11.2	11.8	12.0	1.9
China (mainland)	133.1	133.6	134.0	270.1	269.7	270.2	211.5	209.6	210.5	614.7	612.9	614.7	0.3
India	96.2	103.6	107.6	43.9	44.0	47.3	168.4	176.9	178.8	308.5	324.5	333.7	2.9
Japan	0.9	1.0	1.0	0.2	0.2	0.2	10.8	10.5	10.6	11.9	11.8	11.8	0.6
Myanmar	0.1	0.1	0.1	2.4	2.7	2.8	26.1	25.6	26.4	28.7	28.5	29.4	3.2
Nepal	2.0	2.2	2.2	2.8	3.0	3.0	5.2	5.6	5.4	9.9	10.8	10.6	-1.4
Pakistan	25.5	25.2	25.7	6.6	7.1	7.4	10.7	11.1	11.9	42.8	43.4	45.0	3.7
Philippines	0.0	0.0	0.0	7.7	8.1	8.1	18.6	18.9	19.2	26.3	27.0	27.3	1.1
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.4	5.0	5.1	5.6	5.3	5.4	1.9
Sri Lanka	0.0	0.0	0.0	0.3	0.3	0.3	4.0	4.6	4.7	4.3	4.9	4.9	0.5
Thailand	0.0	0.0	0.0	4.8	4.4	5.2	30.6	28.4	32.3	35.4	32.8	37.5	14.2
Viet Nam	0.0	0.0	0.0	5.1	4.8	4.7	43.7	43.4	43.3	48.7	48.2	48.0	-0.4

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

output at an all-time high of 107.6 million tonnes, largely due to record plantings, driven by the remunerative minimum support prices. In **China (mainland)**, the subregion's main producer, the output is estimated at a near-average level of 134 million tonnes. In **Pakistan**, despite localized crop damage caused by heavy rains and hail in March and April in Punjab Province and by locust infestations, the output is estimated to be close to the five-year average, but below earlier expectations of a bumper output.

Cereal trade forecast at an above-average level in 2020/21

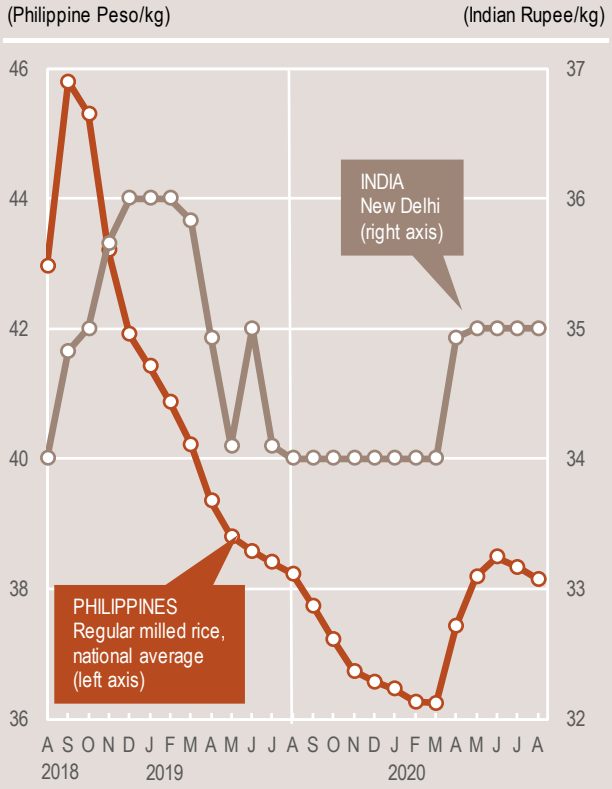
Aggregate wheat import requirements are estimated at 52 million tonnes, close to the five-year average. Above-average wheat imports from the subregion's main importers, namely **Bangladesh**, **Indonesia**, **Malaysia** and **the Philippines**, are expected to be offset by decreases in import demand from **the Republic of Korea**, **Thailand** and **Viet Nam**. The aggregate imports of coarse grains, mostly maize, are forecast to remain at a high level of 74.4 million tonnes in 2020/21, reflecting stable but robust demand for feed products by **China (mainland)**, **Japan**, **the Republic of Korea** and **Viet Nam**, which together normally account for almost 80 percent of the subregion's coarse grain imports. Imports of rice in 2020 are projected at 12.4 million tonnes, 4 percent below the 2019 level. Exports of rice, accounting for the bulk of the subregional export quantity, are forecast to remain stable at 36.2 million tonnes.

Domestic prices of rice at high levels

In **Viet Nam**, after softening in June and July, prices of rice increased in August and were above their year-earlier levels. In **Thailand**, prices of rice increased since June and in August were about 20 percent higher on a yearly basis, underpinned by tight domestic supplies due to the reduced 2019/20 harvest and concerns over limited water supplies for irrigation. Strong buying led to a slight increase in rice prices in **Myanmar** in August. In **India**, prices remained broadly stable in recent months in spite of logistical constraints caused by COVID-19-related movement restrictions. This was a result of the adequate domestic supplies. Prices remained overall stable and around or below their year-earlier levels in **China (mainland),** owing to large domestic availabilities, and in **Cambodia**. In **the Philippines**, an importing country, average prices of rice remained virtually unchanged in the June to August period and close to their year-earlier levels, reflecting adequate market supplies from the 2019 harvest and imports. A slight decline in rice prices was recorded in **Sri Lanka** in August with the onset of the 2020 secondary harvest, while in **Bangladesh**, prices increased in August after floods damaged crops in late July.

As for wheat and wheat flour, prices increased marginally in August in **China (mainland)** amid concerns over the impact of the July to August floods on the spring wheat crops.

Rice retail prices in selected Far East countries



Sources : Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, the Philippines.

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

	Avg 5-yrs (2015/16 to 2019/20)	2019/20	2020/21	2020/21 over 2019/20 (%)	2020/21 over 5-yr avg (%)
Coarse grains					
Exports	*3 463*	*2 859*	*3 044*	*6.5*	*-12.1*
Imports	*66 525*	*71 635*	*74 351*	*3.8*	*11.8*
Production	*372 947*	*375 422*	*380 453*	*1.3*	*2.0*
Rice (millled)					
Exports	*37 265*	*36 174*	*39 323*	*8.7*	*5.5*
Imports	*13 621*	*12 333*	*11 859*	*-3.8*	*-12.9*
Production	*444 203*	*446 828*	*452 408*	*1.2*	*1.8*
Wheat					
Exports	*2 347*	*1 563*	*1 866*	*19.4*	*-20.5*
Imports	*51 049*	*51 729*	*51 909*	*0.3*	*1.7*
Production	*259 414*	*267 309*	*272 467*	*1.9*	*5.0*

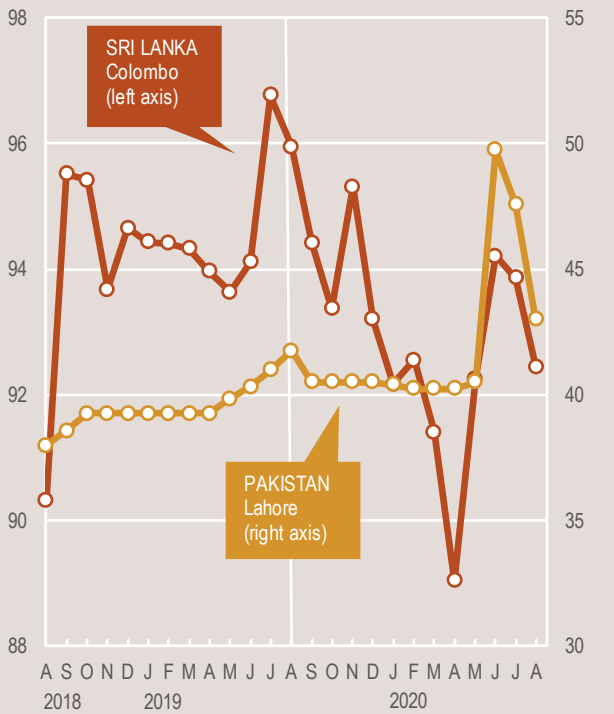
[1] Marketing year July/June for most countries. Rice trade figures are for the second year shown.

By contrast, prices generally weakened in **India**, reflecting the record output in 2020, although large Government purchases limited further decreases. In **Pakistan**, after increasing in June and July, prices of wheat flour decreased in several monitored markets in August, following the Government's measures to boost domestic supplies. The Government removed import restrictions that were imposed on the private sector and an international tender, to procure 1.5 million tonnes of wheat from the international market, was issued by the Trading Corporation of Pakistan, under the Ministry of Commerce. In other importing countries of the subregion, prices of wheat flour increased in August in **Bangladesh**, while they weakened in **Sri Lanka**, and in both countries, prices were lower than their year-earlier values.

Monsoon floods and COVID-19 pandemic heighten food insecurity

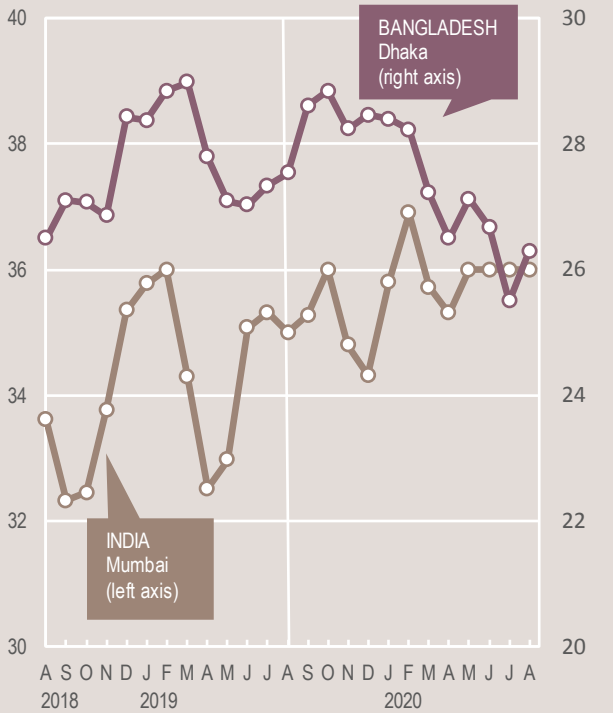
Pockets of severe food insecurity persist and the number of food insecure people could increase, especially in the countries affected by the floods and those that have been more impacted by the COVID-19 pandemic. In **Bangladesh**, severe floods in July affected approximately one quarter of the country, particularly the northern parts. Estimates indicate that about 4 million people were affected and large numbers of houses and infrastructure were destroyed. The floods followed Tropical Cyclone Amphan in May 2020, which had already had a severe impact on the livelihoods of at least 1 million people in the southwestern parts of the country. In addition, the food security situation of large numbers of people has deteriorated as a result of income losses due to the COVID-19-related impacts on the national economy. In the Cox's Bazar District of Bangladesh, about 860 000 refugees from Myanmar still reside in temporary settlements and require humanitarian assistance to cover their basic needs, with the COVID-19 restrictions on movements hampering the deployment of adequate humanitarian assistance. In **Myanmar**, as of June 2020, an estimated 235 000 people, mostly women and children, were internally displaced, with the largest share of these IDPs sheltering in Rakhine and Kachin states. They reside in temporary settlements where they suffer from high levels of food insecurity and require humanitarian assistance to cover their basic needs. In **Pakistan**, concerns about food insecurity persist in some parts of the country, particularly in the newly-merged areas of Khyber Pakhtunkhwa, where around 1.18 million people are currently estimated to be in IPC Phase 3: "Crisis" and Phase 4: "Emergency". In addition, about 1.4 million Afghan refugees are sheltering in Pakistan, most of them are heavily reliant on humanitarian assistance. Northern parts of Pakistan have been affected by localized floods following excessive rains in August, which affected large numbers of people and caused losses of stored crops and seeds as well as small livestock. In **the Democratic People's Republic of Korea**, large numbers of people continue to suffer from low levels of food consumption and very poor dietary diversity. The economic constraints, particularly resulting from the global impact of the COVID-19 pandemic, have increased the population's vulnerability to food insecurity. Excessive precipitations in August triggered localized floods in southern provinces, affecting a large number of people, causing losses of livestock and food supplies.

Wheat flour retail prices in selected Far East countries



Sources : Pakistan Bureau of Statistics; Department of Census and Statistics, Sri Lanka.

Wheat flour retail prices in selected Far East countries



Sources : Ministry of Consumer Affairs, India; Management Information System and Monitoring, Bangladesh.

NEAR EAST

Above-average 2020 cereal production forecast

Harvesting of the 2020 winter wheat and barley crops was completed by July, while harvesting of the spring wheat and barley crops started in August and will continue until September. Maize will be harvested from mid-September, followed by rice from October.

Although the winter cereal season started with some dryness in parts of **Turkey**, **the Islamic Republic of Iran** and **Iraq**, generally adequate and well-distributed rains since January replenished and maintained soil moisture across the subregion.

Total cereal production (rice in paddy equivalent) in 2020 is forecast at an above-average level of 78.1 million tonnes, about 5 percent more than in the previous year and 10 percent above the average. The expected increase is supported by foreseen production recoveries in **Turkey**, **Iraq**, **the Syrian Arab Republic** and, to a lesser extent, in **Saudi Arabia**. In **Turkey**, the subregion's main cereal producer, the production revival is underpinned by increased plantings and favourable meteorological conditions in 2020, particularly in May when cool and wet weather favoured crops from reproductive to filling stages. The official production forecast indicates a slightly above-average cereal output of 36.5 million tonnes, about 7 percent more than in the previous year, including 20.5 million tonnes of wheat, 8.3 million tonnes of barley and 6 million tonnes of maize.

Favourable weather conditions, coupled with improved security conditions, also led to an upturn in cereal production in **the Syrian Arab Republic** where the 2020 harvest is estimated at 5.2 million tonnes, over 20 percent more than in the previous year and about 77 percent above the five-year average. The harvest comprised about 2.8 million tonnes of wheat (an increase of 52 percent compared to the average) and 2.3 million tonnes of barley (more than double the average). Given the decimated livestock numbers in the country and comparatively low feed requirements, it is likely that some barley will be marketed abroad.

Favourable weather conditions also prevailed in **Iraq** where the Government purchased about 5.1 million tonnes of wheat, approximately 0.5 million tonnes more than last year. The total cereal harvest is forecast at an above-average level of at least 7.5 million tonnes, almost 10 percent over the previous year's harvest.

Production increases were also reported in **Saudi Arabia.** Since 2018, the Government has reintroduced its support for wheat production to provide forage producers with an alternative crop and, consequently, the 2020 wheat production is forecast to increase by 150 percent compared to 2019 to 500 000 tonnes, but still well below the average of about 2.5 million tonnes of wheat that was harvested prior to 2015.

In **Yemen**, the conflict continues to debilitate agricultural livelihoods by limiting the availability of inputs and constraining access to fields. Abundant rainfall caused floods in several governorates and provided favourable vegetation conditions for breeding of desert locusts. Locust control operations were underway, but the country's ability to respond remains constrained by the ongoing conflict. While damages to crops caused by floods were relatively limited, floods destroyed general infrastructure.

Although favourable weather conditions prevailed across **Afghanistan** except in the northeast, structural issues, including the lack of agricultural inputs, continues to constrain production. The northeast part of the country suffered from drought until April and heavy rainfall at the end of August caused flash flood events and resulted in some localized crop damage. However, the impact on the spring wheat crops was limited. Cereal production in 2020 is preliminarily forecast at a slightly above-average level of 5.7 million tonnes, although about 7 percent below the 2019 bumper harvest.

The subregional cereal import requirement in the 2020/21 (July/June) marketing year is estimated at 75 million tonnes, approximately 1 million tonnes above the previous year and about 8 percent above the five-year average. At 30.3 million tonnes, the wheat import requirement is estimated to remain similar to the previous year's level and 5 percent above the five-year average, supported by population growth.

Persisting conflict and weak economies worsen food insecurity

The pandemic-induced global economic slowdown put downward pressure on international oil prices, which in turn resulted in challenging fiscal situations for many countries in the subregion given the reliance on oil as the main source of

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Near East	44.5	45.6	47.9	21.8	23.7	24.9	4.6	5.3	5.4	70.9	74.6	78.1	4.8
Afghanistan	4.4	5.1	4.7	0.5	0.4	0.5	0.6	0.6	0.5	5.5	6.1	5.7	-6.9
Iran (Islamic Republic of)	13.8	14.5	14.0	4.4	4.1	4.3	2.9	3.1	3.3	21.1	21.7	21.6	-0.6
Syrian Arab Republic	1.8	2.2	2.8	1.1	2.1	2.4	0.0	0.0	0.0	3.0	4.3	5.2	21.1
Turkey	20.7	19.0	20.5	14.1	14.3	15.1	0.9	1.0	1.0	35.7	34.3	36.5	6.5

income. Although oil prices have partially recovered, they remained below their year-earlier levels as of August 2020. In addition, the curfews and restrictions on the movement of people to contain the virus have limited employment opportunities, especially for casual labourers and, consequently worsened an already unfavourable food security situation in several countries. Remittances have also declined, further tightening households' incomes.

In **Yemen**, the weak fiscal position has been further eroded by the depletion of hard currency reserves and the decline in remittances. Over 80 percent of the total population, about 24.3 million people, require some form of humanitarian assistance. The national Food Security Cluster estimates that 20.1 million people are in need of food assistance and agriculture interventions from June to December 2020, out of which 10 million people are in acute need. The IPC partial analysis found that, out of the total population of 7.96 million people in the 133 analyzed districts, about 2 million were estimated to be highly food insecure (IPC Phase 3 and above) in the period from February to April 2020. In the period from July to December 2020, the population facing acute food insecurity (IPC Phase 3 and above) is estimated to have increased to 3.2 million (40 percent of the analyzed population) if humanitarian food assistance is kept at the current levels.

In **Lebanon**, in July 2020 (latest information available), consumer prices rose by over 112 percent compared to July 2019, while the food price inflation reached over 330 percent year on year. On 4 August 2020, a devastating explosion occurred in the Beirut Port, resulting in the loss of lives and widespread destruction. The blast destroyed parts of the port including the bulk terminal and main grain silo, neighbourhoods in the vicinity and caused material damages in the greater Beirut area. The total capacity of the port silos in Beirut was 120 000 tonnes. It was estimated that at the time of the blast, there were between 10 000 and 15 000 tonnes of wheat, sufficient to cover the milling needs for five to ten days. In addition, between 40 000 and 56 000 tonnes of maize, imported by private traders, were also stored in the silo. Although the bulk receiving terminal remains out of commission, a great number of vessels are unloaded in the Port of Tripoli and trucked inland for storage. The declining economic conditions have pushed a large number of Lebanese to poverty. According to the Ministry of Finance, about 45 percent of Lebanese citizens (equivalent sto 2.43 million people) lived in poverty as of April 2020, with 22 percent in extreme poverty, although this figure is likely to be higher as increasing inflation and unemployment resulting from the deepening economic crisis, coupled with the impact of COVID-19-related measures constrain employment opportunities and incomes.

According to WFP's Vulnerability and Analysis Mapping (July 2020), there are 9.3 million food insecure people and a further 2.2 million are at risk of food insecurity in **the Syrian Arab Republic**, up from 7.9 million and 1.9 million, respectively, in 2019. The increase is attributed to high food and fuel prices, stagnant salaries and loss of livelihood opportunities related both to the weak economy as well as the effects of the COVID-19 pandemic. The spillover effects from the political and financial crisis in Lebanon, put an upward pressure on the exchange rate, affecting the purchasing power of consumers as well as the ability of industrial producers to procure inputs. In September 2019, USD 1 was traded for SYP 600, while in June 2020 the rate was USD 1:SYP 2 650 before strengthening to SYP 2 190 in early September 2020.

In **Afghanistan**, between April and May 2020, about 10.9 million people (35 percent of the population) were estimated to be in acute food insecurity and required urgent humanitarian assistance. It included around 7.4 million people in IPC Phase 3: "Crisis" and 3.5 million in IPC Phase 4: "Emergency". The food security situation in rural areas is likely to improve with the completion of the harvest and about 10.3 million people are forecast to be in IPC phases 3 and 4 between June and November 2020. By contrast, the food security of the vulnerable population, including IDPs and the urban poor, is likely to deteriorate due to the limited employment opportunities for casual labourers resulting from the stagnant economy and the COVID-19 containment measures.

In **Iraq**, according to the 2020 Humanitarian Needs Overview (HNO) released in November 2019, the number of people in need of humanitarian assistance was forecast to decrease from 6.7 million in 2019 to 4.1 million in 2020. The actual numbers are likely to be higher as opportunities for casual labour decreased. The number of severely food insecure people is estimated at about 920 000, while 1.7 million are vulnerable to food insecurity, mostly IDPs and returnees, with the majority concentrated in the governorates of Diyala, Nineveh, Salah Al-Din, Anbar and Kirkuk.

CIS IN ASIA[3]

Cereal production in 2020 projected at an average level

Harvesting of the 2020 winter cereals was completed in August, while spring cereals, which account for approximately 70 percent of the annual grain output, are currently being harvested under generally favourable weather conditions. The total subregional cereal output is forecast at a near-average level of 35.1 million tonnes. The generally favourable production outlook rests on expectations of an above-average subregional output of barley, forecast at 6 million tonnes, driven by large plantings in Kazakhstan, the main producer in the subregion. The aggregate wheat output, accounting for about 70 percent of the total cereal production, is forecast at a slightly below-average level of 24.3 million tonnes.

In **Kazakhstan**, harvesting of spring wheat, which accounts for more than 90 percent of the annual wheat production, is expected to be completed at the end of September. Despite large plantings, the 2020 aggregate wheat output (including the minor winter crops) is forecast at 13 million tonnes, 6 percent below the average, as drier and warmer-than-average weather conditions in May and June negatively affected the spring crops in some regions and brought down yields. Reduced wheat harvests are expected in **Armenia** and **Georgia**, where seasonal rainfall shortages affected crops, while production in **Turkmenistan** is forecast at an above-average level. In **Azerbaijan**, despite the negative impact of reduced rainfall on yields in some areas, the 2020 wheat output is forecast at a near-average level due to large plantings.

Wheat exports from Kazakhstan forecast slightly below average in 2020/21

Total cereal exports from **Kazakhstan** in the 2020/21 marketing year (July/June) are forecast at 8.6 million tonnes, 4 percent below the average. Most of this volume is comprised of wheat and exports are forecast at 7 million tonnes, 9 percent below the five-year average on account of the reduced output expected in 2020. By contrast, barley exports are projected at 1.5 million tonnes, a well above-average level.

Total subregional import requirements of cereals, mainly wheat, are forecast at a near-average level of 7.8 million tonnes, as high import demand for wheat from **Kyrgyzstan** and **Uzbekistan**, is expected to be offset by reduced demand from **Turkmenistan**.

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
CIS in Asia	25.3	23.7	24.3	8.8	9.4	9.7	35.3	34.2	35.1	2.6
Armenia	0.2	0.1	0.1	0.2	0.1	0.1	0.4	0.2	0.2	24.5
Azerbaijan	1.9	2.2	1.9	1.2	1.3	1.3	3.1	3.5	3.2	-7.8
Georgia	0.1	0.1	0.1	0.3	0.3	0.2	0.4	0.4	0.3	-13.6
Kazakhstan	13.8	11.5	13.0	4.7	5.2	5.5	18.9	17.1	19.0	10.8
Kyrgyzstan	0.6	0.6	0.6	1.1	1.2	1.1	1.8	1.8	1.8	-0.8
Tajikistan	0.9	0.8	0.8	0.4	0.3	0.3	1.3	1.2	1.3	1.9
Turkmenistan	1.3	1.6	1.4	0.1	0.1	0.1	1.5	1.8	1.6	-9.9
Uzbekistan	6.4	6.8	6.3	1.0	1.0	1.0	7.8	8.2	7.7	-6.4

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

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

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

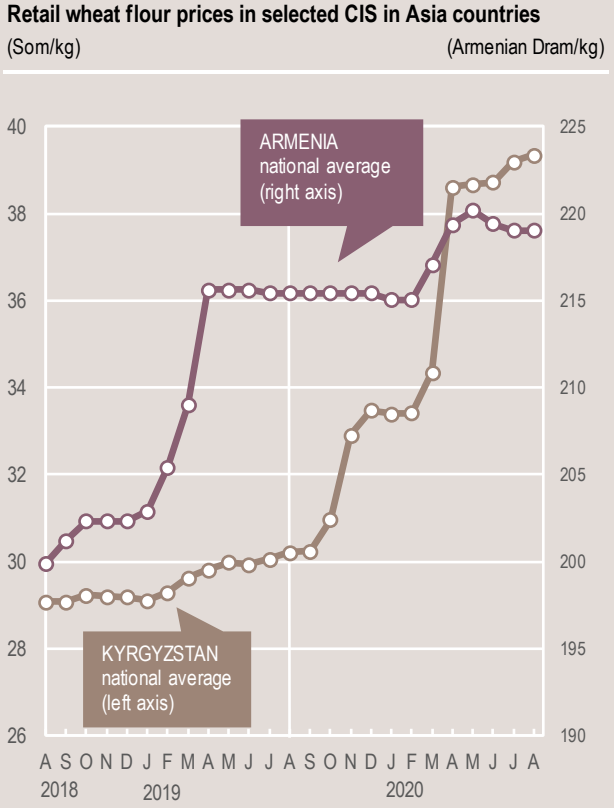
Domestic prices of wheat flour declined from June with the beginning of the 2020 harvest

In **Kazakhstan**, export prices of wheat increased between March and May 2020, and then decreased in June and July, mirroring trends in the international market and responding to the removal of trade restrictions on 1 June 2020. However, the low 2019 output, a weaker domestic currency and strong export demand this season have kept prices well above their year-earlier levels in both export and domestic markets.

In the importing countries of the subregion, retail prices of wheat flour generally increased from mid-March to May 2020, mainly due to an uptick in consumer demand following the outbreak of the COVID-19 pandemic, and declined afterwards with the beginning of the winter wheat harvests and the easing of the COVID-19 restrictive measures. In **Tajikistan**, after sharp increases between March and May 2020, prices of wheat flour declined seasonally in most markets in June and July. Similarly, in **Armenia**, wheat flour prices slightly increased between February and May, and remained stable or slightly decreased in the following two months, amid the introduction of COVID-19-related export restrictions on staple foods. In **Georgia** and **Kyrgyzstan**, prices remained overall stable between May and July as a result of the temporary measures put in place by the respective governments to prevent price increases, including setting ceiling prices for a number of food items in wholesale and retail markets.

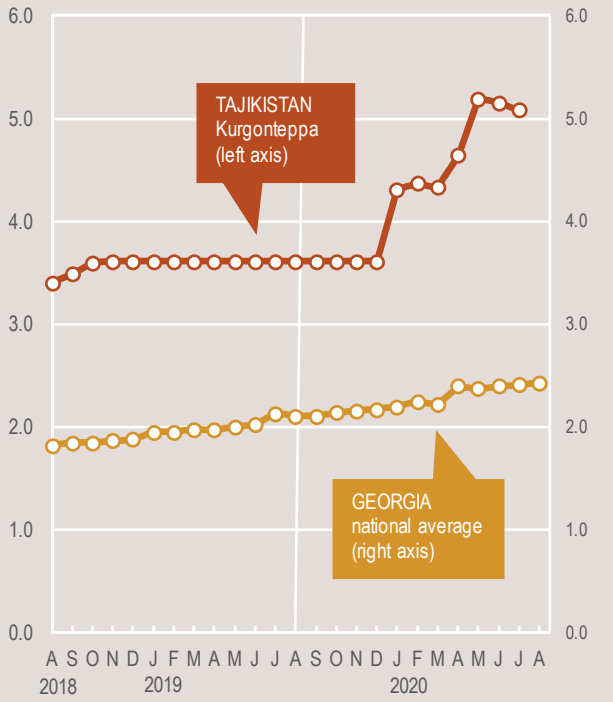
Prices of potatoes, another staple food in the subregion, after increasing seasonally in June, decreased sharply in July in **Kazakhstan** and **Kyrgyzstan** in response to new supplies from the 2020 harvest. In **Georgia** and **Tajikistan**, prices of potatoes increased between February and April 2020, in line with seasonal trends, but declined in the May-July period.

Retail wheat flour prices in selected CIS in Asia countries



Sources : National Statistical Service of the Republic of Armenia; National Statistical Committee of the Kyrgyz Republic;

Retail wheat flour prices in selected CIS in Asia countries



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

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

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

CENTRAL AMERICA AND THE CARIBBEAN

Mexico
Coarse grains (summer): Vegetative to maturing
Paddy (summer): Harvesting
Wheat (winter): Land preparation

Central America
Maize (first season): Harvesting

SOUTH AMERICA

Brazil
Maize (main season): Planting

Centresouthern states
Wheat (winter): Harvesting

Uruguay
Barley: Vegetative
Maize (main season): Planting
Wheat (winter): Vegetative

Argentina
Wheat (winter): Vegetative
Maize (main season): Planting

Source: GIEWS

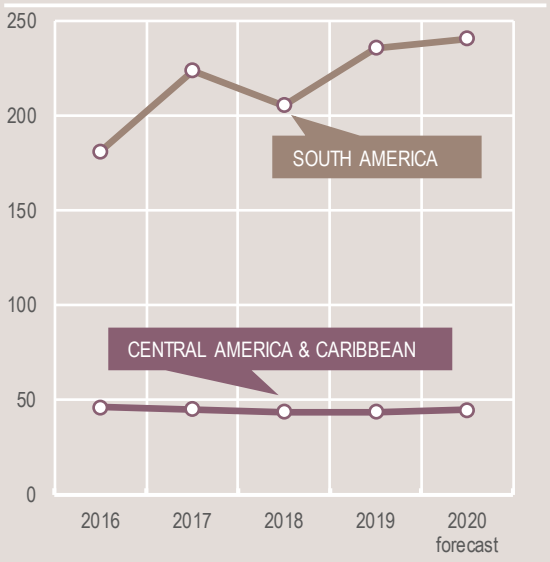
** See Terminology (*page 6*)

Latin America and the Caribbean Production Overview

Cereal production in 2020 is forecast to surpass the record output attained last year and set a new peak of 286 million tonnes in 2020, about 13 percent above the five-year average. The expected large outturn mainly reflects record maize harvests in South America's main producers, Brazil and Argentina, spurred by strong export demand. Favourable production prospects for wheat, mainly grown in the winter months, reinforces the overall positive production outlook.

In Central America, harvesting of the 2020 main season maize crop is ongoing. Production is expected at a slightly above-average level, mainly reflecting favourable weather conditions that have boosted yield prospects. By contrast, production of wheat, mostly produced in Mexico and with the main season crops harvested by June, is estimated at a below-average level on account of a contraction in the planted area.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Below-average wheat harvest estimated in 2020

In **Mexico**, harvesting of the 2020 main winter crop, which accounts for about 95 percent of the subregional output, was completed in July. Although yields were reported to be above average, the area sown was estimated to be 18 percent lower than the five-year average as a result of a continuous shift to more remunerative horticulture crops, with farmers further discouraged this year by soil moisture deficits at planting time. Sowing of the 2020 minor season wheat crop was recently completed and the area planted is expected at a reduced level. Overall, the aggregate wheat production in 2020 is forecast at a below-average level of 3 million tonnes.

Maize production forecast slightly above average in 2020

The aggregate maize output of the subregion is forecast at 32 million tonnes in 2020, slightly above the five-year average, mainly reflecting expectations of a modest production increase in *Central American* countries, on account of favourable weather conditions.

In **Mexico**, the largest cereal producer in *Central America*, total maize production is forecast at an average level of 27.4 million tonnes in 2020. Production of the minor season maize crop, harvested in the second quarter of 2020, is estimated at a near-average level, as reduced sowings were offset by good yields. Production of the main season crop, currently at flowering and grain-filling stages, is also forecast at an average level, reflecting mostly favourable crop conditions in key producing central areas.

Elsewhere in the subregion, harvesting of the 2020 main season maize crop is ongoing and overall prospects are favourable owing to generally conducive weather conditions. A localized outbreak of the Central American locusts (*Schistocerca piceifrons*) in northern Guatemala, as well as in central and eastern El Salvador, was reported in mid-June as abundant rainfall and high temperatures created conducive conditions for pest infestations. However, the outbreak was successfully contained as of mid-August and no major crop losses were reported. Overall, production of the main season cereal crops is expected to recover from last year's dry weather-reduced harvest and reach slightly above-average levels in **El Salvador**, **Guatemala**, **Honduras** and **Nicaragua** in 2020, reflecting good yields and expansions in the area sown. The minor season maize crop is currently being planted and production prospects are also favourable as precipitation for the September-November period are forecast to be normal to above-normal in El Salvador, Guatemala and Honduras.

In **Haiti**, harvesting of the 2020 main maize crop is nearing completion and a below-average production is expected due to reduced acreage, as farmers responded to higher production costs. In addition, below-average rainfall amounts between April and May delayed planting operations and affected crop germination and development, which are foreseen to curb crop yields. Although the late-planted crops are likely to have benefitted from the improved precipitation since mid-July, the average crop yield is estimated to be below average. In late August, the passage of Tropical Storm Laura caused some localized floods in the southeastern areas, but the storm caused only marginal damage to standing crops. For the remaining two minor season crops, despite the favourable rainfall expected in the September-November period, the area planted is forecast to remain at a low level due to the high production costs and low availability of seeds following a below-average main season harvest. Moreover, weather forecasts point to a higher probability of more frequent and intense hurricanes during the June-November period, which raises additional risks to agriculture production. Production of paddy in 2020 is forecast to decline for a second consecutive year due to high production costs and scarce availability of irrigation water.

Table 15. Latin America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Central America and the Caribbean	*3.5*	*3.2*	*3.0*	*37.6*	*37.4*	*38.8*	*2.9*	*2.9*	*3.1*	*44.0*	*43.5*	*44.8*	*3.0*
El Salvador	*0.0*	*0.0*	*0.0*	*0.9*	*1.0*	*1.0*	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*1.1*	*5.3*
Guatemala	*0.0*	*0.0*	*0.0*	*1.9*	*1.9*	*2.0*	*0.0*	*0.0*	*0.0*	*2.0*	*2.0*	*2.0*	*2.8*
Honduras	*0.0*	*0.0*	*0.0*	*0.6*	*0.5*	*0.7*	*0.1*	*0.1*	*0.1*	*0.7*	*0.6*	*0.7*	*35.0*
Mexico	*3.5*	*3.2*	*3.0*	*32.8*	*32.6*	*33.8*	*0.3*	*0.3*	*0.3*	*36.5*	*36.2*	*37.1*	*2.6*
Nicaragua	*0.0*	*0.0*	*0.0*	*0.5*	*0.5*	*0.5*	*0.4*	*0.4*	*0.4*	*0.8*	*0.9*	*0.9*	*4.6*
South America	*26.7*	*28.6*	*29.4*	*157.3*	*184.2*	*187.1*	*24.4*	*22.9*	*24.2*	*208.3*	*235.7*	*240.7*	*2.1*
Argentina	*17.5*	*19.8*	*19.0*	*52.0*	*63.3*	*65.3*	*1.4*	*1.2*	*1.2*	*70.8*	*84.2*	*85.5*	*1.5*
Brazil	*5.4*	*5.2*	*6.8*	*88.5*	*103.8*	*106.2*	*11.6*	*10.4*	*11.2*	*105.5*	*119.4*	*124.2*	*4.0*

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

By contrast, in **the Dominican Republic**, where harvesting of the paddy crop takes place all year around, an above-average production is expected in 2020 driven by an expansion in plantings for the fifth consecutive year. Following below-average rainfall amounts in the April-June period that led to reduced yields of the early planted crops, near-average rainfall amounts are forecast in the September-November period, boosting production prospects of the remaining 2020 crops.

Cereal imports forecast at high levels in 2020/21

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

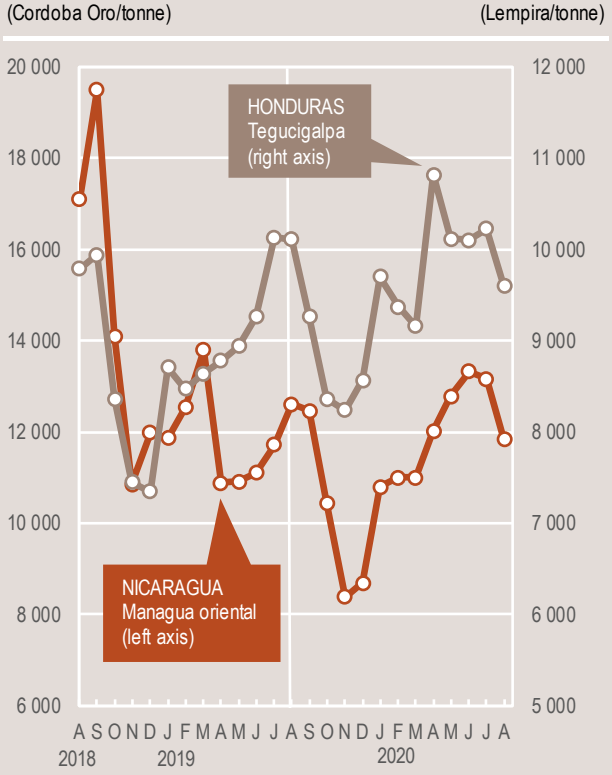
Prices of beans declined after a COVID-19-induced uptick

In **Honduras** and **Nicaragua**, prices of red beans decreased by more than 45 percent in August compared to the previous month. Similarly, prices of red beans decreased sharply in July and August in **El Salvador**. These price drops mainly reflect the increase in market availabilities following the start of the minor season harvest and a slowdown in households' purchases compared to the upsurge earlier in the year triggered by the COVID-19 pandemic. As of August, in the major bean producing country of Nicaragua, prices were moderately lower than a year earlier on account of the good harvests obtained in 2019. Similarly, prices of black beans declined for the second consecutive month in August in line with seasonal trends in **Guatemala**. However, prices were well above their year-earlier levels reflecting the upsurge during the second quarter of 2020, supported by the sharp increases in domestic demand amid the COVID-19 pandemic. In **Mexico**, prices of black beans strengthened seasonally and were more than 30 percent higher year on year due to the reduced 2019 harvest. These higher prices are expected to spur an expansion in plantings for the main cropping season.

Prices of white maize generally declined seasonally in the subregion. In **Guatemala** and **Nicaragua**, prices of white maize declined since July and were slightly lower year on year. In **El Salvador**, prices also decreased seasonally between June and August and were about 15 percent lower than a year earlier reflecting a good 2019 harvest. In **Honduras**, prices weakened in August due to increased supplies from the ongoing harvest and favourable production prospects for the current main season. By contrast, in **Mexico**, after seasonal declines in the past months, prices rebounded in August reflecting strong export demand during the second quarter of 2020.

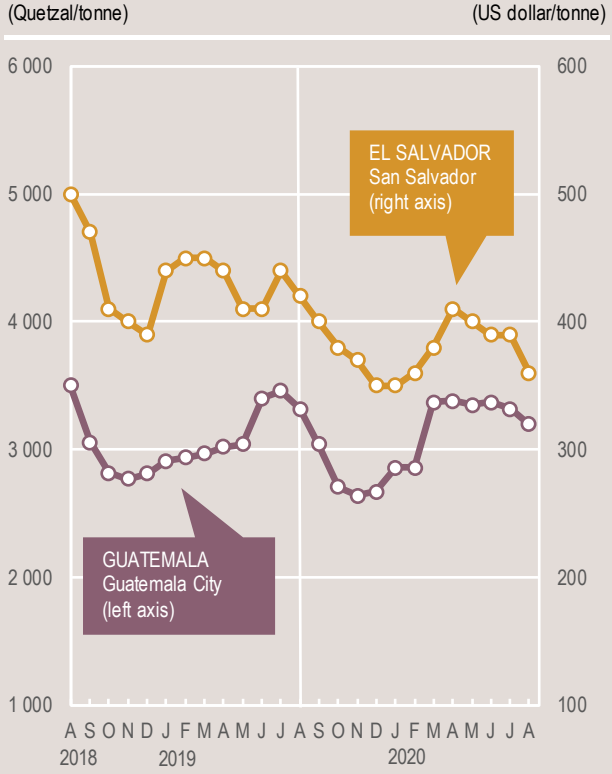
In **Haiti**, prices of maize meal declined for the second consecutive month in July reflecting the start of the main season harvest and the weakened domestic demand that had increased at the beginning of the COVID-19 pandemic. Prices remained higher year on year on account of the poor outputs obtained in 2019, exacerbated by expectations of another dry weather-affected harvest in the 2020 main season. Prices of rice, a cereal that is mostly imported, increased in the June-July period due to lower imports in the second quarter of 2020 compared to the same period last year. Prices of staple grains remained well above their year-earlier levels due to high production costs, supported by a weak national currency, which lost more than 18 percent of its value against the United States dollar over the past 12 months.

Wholesale white maize prices in selected Central America countries



Sources : Secretaria de Agricultura y Ganaderia, Honduras; Ministerio agropecuario y forestal, Nicaragua.

Wholesale white maize prices in selected Central America countries



Sources : Ministerio de Agricultura, Ganadería y Alimentación, Guatemala; Dirección General de Economía Agropecuaria, El Salvador.

SOUTH AMERICA

Larger plantings expected to result in a record maize output

Harvesting of the 2020 main season maize crop is complete in the major producing countries of Argentina and Brazil. The 2020 subregional production is expected to surpass the record output obtained in 2019 and is forecast at a new peak of 173 million tonnes, 20 percent above the previous five-year average. The bumper harvest reflects record-large planted areas in the main producers, driven by high domestic prices and strong export demand, and above-average yields. In **Argentina**, production is officially estimated at 58.5 million tonnes, nearly 30 percent higher than the previous five-year average, underpinned by a record-large sown area of 9.5 million hectares. Similarly, in **Brazil**, production is officially estimated at a peak of 102.1 million tonnes in 2020, driven by record high sowings, which exceeded the previous year's historical high by 6 percent. Despite dry weather conditions in the key producing southern and southeastern regions, yields are estimated at above-average levels but down from the previous year. Similarly, in **Uruguay**, production is officially estimated at 763 000 tonnes, about 50 percent higher than the five-year average, reflecting near-record sowings. In **Ecuador**, where the harvest of the minor season maize crop is ongoing, production prospects are also generally favourable on account of good yield prospects. By contrast, in **Paraguay**, the harvest is estimated at a below-average level, as dry weather conditions caused a contraction in plantings and lowered crop yields. In **Chile**, the 2020 production was estimated at a well below-average level on account of low yields, due to rainfall deficits, and a record low-planted area as farmers continued to shift to the cultivation of horticulture crops rather than maize. In **Colombia** and **Peru**, where the harvest of the main season crop is nearing completion, the 2020 output is anticipated at a slightly below-average level due to soil moisture deficits at planting stages that resulted in a contraction of area sown. In **the Bolivarian Republic of Venezuela**, harvesting of the main season maize crop is ongoing and the preliminary forecast points to a well below-average production, underpinned by a continual decrease in the planted area that started since the economic crisis in 2014. In addition to the acute scarcity of agricultural inputs and fuel that has constrained crop yields, limited rainfall amounts between June and July also affected crop germination and development in the key producing centralwestern areas.

The 2020 wheat crop is at different development stages in the subregion. In **Argentina**, the major producer of the subregion, planting operations were recently completed amid concerns over the impact of the limited precipitation on early crop development in the centralnorthern producing areas. The area sown is officially estimated at an above-average level of 6.7 million hectares, spurred by high domestic prices, as the significant depreciation of the country's currency boosted export demand and contributed to pushing up prices. Weather forecasts indicate a higher likelihood of average precipitation during the third quarter of 2020, which is expected to diminish the current soil moisture deficits and boost yield prospects. Outbreaks of locusts, which were reported in June in eastern areas of the country, were contained due to effective control measures and, according to official reports, crop and pasture losses have been limited. In **Brazil**, the 2020 wheat crop is being harvested in the major producing southern regions and production is officially forecast at 6.8 million tonnes, 26 percent higher than the five-year average due to large sowings and expectations of high yields. However, frost and heavy rainfall in late August in the main producing southern areas are likely to have affected crop productivity, lowering initial yields expectations. In **Chile**, despite a year-on-year increase in plantings driven by remunerative prices, the area planted is officially estimated at a below-average level. Improved rains since June have been conducive for crops, raising prospects that good yields will be attained. In **Paraguay** and **Uruguay**, where the harvest will take place in the last quarter of 2020, plantings are estimated at below-average levels due to delayed harvests of the soybean crop that precedes the planting of the wheat crop. Current crop conditions are reportedly favourable in the major wheat producing regions.

The paddy harvest was completed in May and the 2020 output is estimated at an average level in **Brazil**, the major rice producer of the subregion, as a contraction in plantings was offset by record high yields. In **Uruguay**, paddy production is estimated to remain below average owing to a record low-planted area, which has been declining during the last decade driven by high production costs. Similarly, the 2020 output is expected at a slightly below-average level in **Ecuador**, as reduced rainfall amounts caused a decline in yields. By contrast, in **Colombia** and **Peru**, where the harvest of the 2020 main season paddy crop is ongoing, above-average outputs are anticipated, mainly due to large sowings and good yields, respectively.

Substantial quantities of cereal exports forecast in 2020/21

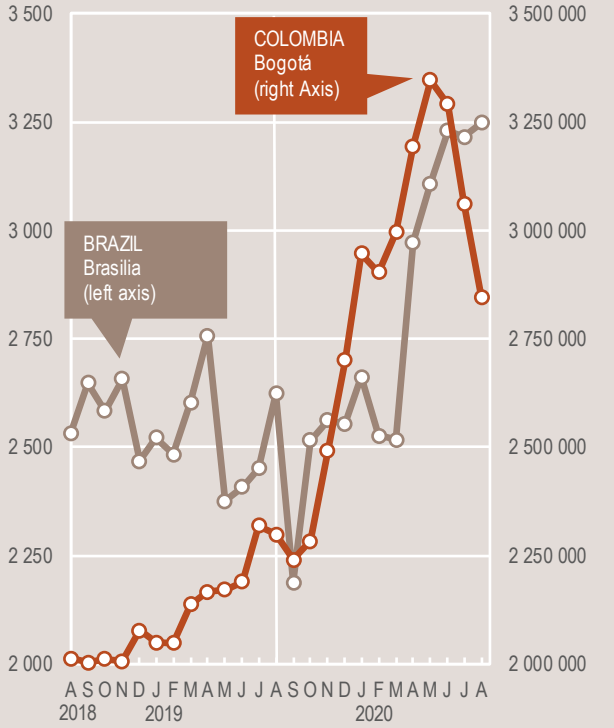
Aggregate cereal exports in the 2020/21 marketing year (March/February), mainly maize, are forecast at a high level of 94 million tonnes. The large quantity mainly reflects the expected bumper outputs in **Argentina** and **Brazil**, coupled with weak local currencies, which have enhanced export competitiveness of both countries. Of the total export forecast, maize exports are forecast at 73 million tonnes, more than 30 percent above the average, and wheat exports are forecast at a record high of 15 million tonnes, mainly reflecting the expected large exportable supplies in Argentina.

Strong export demand sustains prices of yellow maize

In the major maize exporting countries of **Argentina** and **Brazil**, despite the recent completion of the 2020 harvest, prices of yellow maize increased in the June-August period. Prices were higher year on year, mainly reflecting the sustained increase in export demand, underpinned by the weak national currency. In **Chile**, prices were generally stable as an increase in import quantities in the second quarter of 2020 offset the upward pressure from the well below-average production in 2020. After several months of stability, prices declined in August in **Uruguay** reflecting good market availabilities from the above-average 2020 output. However,

Wholesale rice prices in selected countries in South America

(Brazilian Real/tonne) (Colombian Peso/tonne)



Sources : Departamento Administrativo Nacional de Estadística (DANE), Colombia; Instituto de Economía Agrícola, Brazil.

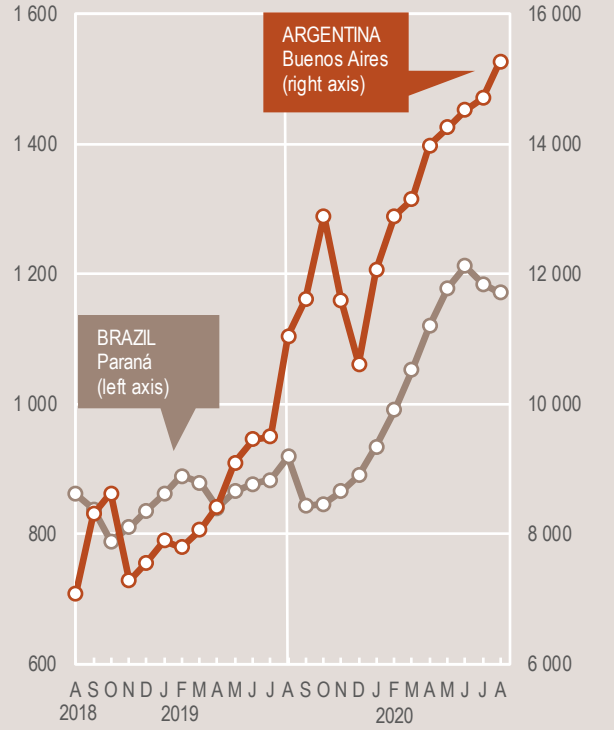
prices were still higher than the levels in August 2019 due to higher production costs, which reflect the effects of a weaker currency.

During the June-August period, prices of rice decreased in **Colombia**, reflecting improved market availabilities from the new harvests and a return to normal levels of retail demand, which increased sharply at the start of the COVID-19 pandemic in April. However, prices remained above their values a year earlier, mainly reflecting high production costs stemming from a weaker currency. Prices of rice also seasonally declined in **Ecuador** and **Peru**. By contrast, in **Brazil**, despite the completion of the 2020 harvest in May, prices of rice increased due to strong domestic demand and were more than 40 percent higher on a yearly basis in August. In **Uruguay,** prices increased sharply in July due to higher export sales during the second quarter of 2020.

Prices of wheat grain strengthened seasonally in **Argentina** in the June-August period and growing concerns over the dry weather conditions on the 2020 crop exerted additional upward pressure. In **Chile**, prices increased in August reflecting lower import quantities in the second quarter of 2020 compared to the same period in 2019. However, prices were more than 15 percent higher year on year in August due to a reduced 2019 output and a weak currency. By contrast, prices weakened since July in **Brazil**, as the start of the 2020 harvest and favourable production prospects exerted downward pressure on prices. In **Ecuador** and **Peru**, prices of wheat flour wsere overall stable between June and August and were near their year-earlier values. Prices were also stable in **Colombia**, but were higher year on year, underpinned by the depreciation of the national currency.

Wholesale wheat prices in selected countries in South America

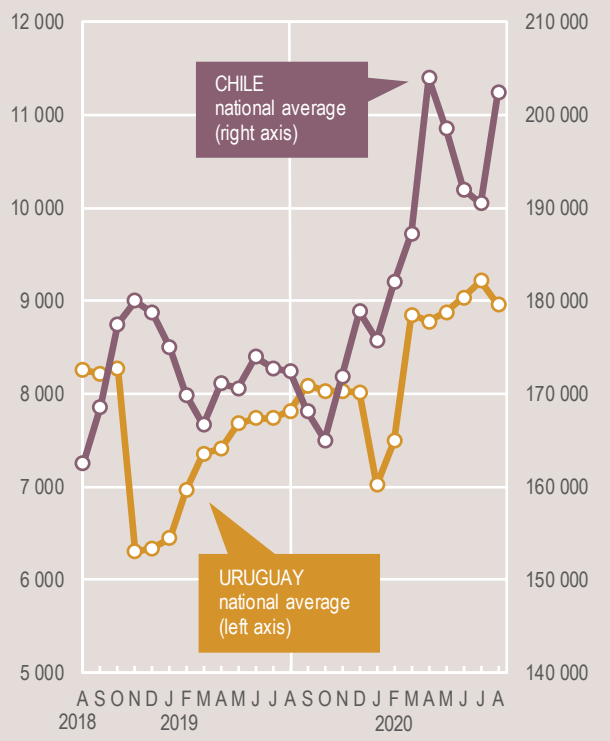
(Brazilian Real/tonne) (Argentine Peso/tonne)



Sources : Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

Wholesale wheat prices in selected countries in South America

(Peso Uruguayo/tonne) (Chilean Peso/tonne)



Sources : Instituto Nacional de Estadística, Uruguay; Cotrisa, Chile.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of August
Territories/boundaries**

NORTH AMERICA

Canada
Maize: Reproductive
Small grains: Maturing to harvesting

United States of America
Maize: Maturing to harvesting
Grains (winter): Planting

EUROPE

Northern Europe
Grains (winter): Planting to early development

Centresouthern Europe
Maize: Harvesting
Grains (winter): Land preparation to planting

CIS in Europe:
Maize: Mostly harvested
Small grains: Mostly harvested
Grains (winter): Land preparation

OCEANIA

Australia
Cereals (winter): Vegetative to reproductive

Source: GIEWS

** See Terminology (*page 6*)

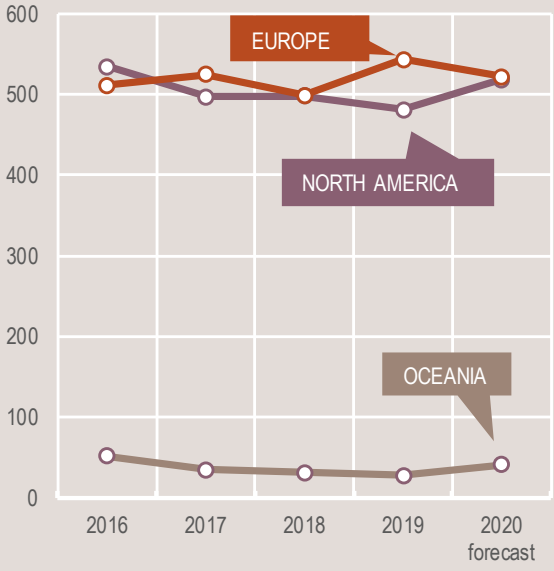
North America, Europe and Oceania Production Overview

In North America, despite recent cutbacks to the production forecast, cereal production is expected to recover in the United States of America in 2020, reflecting a bumper maize output that more than offset a smaller wheat harvest. Similarly, cereal production in Canada is forecast to rise in 2020 resting on larger outturns of wheat and coarse grains.

In the European Union, cereal production is expected to decline in 2020 to a below-average level, reflecting adverse weather and low plantings. Among the CIS countries in Europe, the aggregate wheat output is forecast at an above-average level underpinned by record high plantings in the Russian Federation. Similarly, maize production is expected at a bumper level due to a record large planted area in Ukraine.

In Oceania, on account of conducive weather conditions, cereal production is forecast to recover strongly in Australia in 2020, following the drought-reduced harvests obtained in 2018 and 2019.

Cereal production
(million tonnes)



NORTH AMERICA

Maize production anticipated to increase in the United States of America and Canada

In **the United States of America**, harvesting of the maize crops started recently and production is forecast at an above-average level of 380 million tonnes, 10 percent higher year on year. The production forecast was, however, revised downward in recent months as plantings, albeit still larger year on year, were estimated to be lower than earlier expectations, while recent storm damage in the Midwest caused crop losses and impaired yield prospects. Nonetheless, national yields are still expected to recover from the previous year's low level, which is the main factor driving the overall buoyant production outlook.

Regarding wheat, harvesting of the 2020 main winter crop concluded in July and the minor spring crop is expected to be harvested by the end of September. At the aggregate level, production of wheat is forecast at 50 million tonnes, 4 percent below the previous five-year average and a 2-million-tonne decrease compared to the outturn in 2019, mainly reflecting weather-reduced yields.

In **Canada**, harvesting of the 2020 maize crop started in early September and production is forecast at 13.8 million tonnes, close to the five-year average but slightly higher compared to the previous year, as favourable weather led to an increase in yields that more than offset a reduction in the area sown. Harvesting of the minor winter wheat crop concluded recently, while the main spring harvest is still ongoing. Aggregate wheat production is officially forecast at 35 million tonnes, a 2.5-million-tonne increase on a yearly basis and 13 percent higher than the five-year average. Despite a slight contraction in the planted area, the expected production increase mainly rests on an upturn in yields, supported by favourable weather conditions.

EUROPE

EUROPEAN UNION

Reduced acreage and poor weather cut harvest expectations in the European Union

Cereal production in the *European Union* is expected to decline in 2020 to a below-average level of 282 million tonnes, reflecting foreseen harvest reductions for wheat and coarse grains. Aggregate production of wheat, including the main winter wheat crop that was harvested earlier in the year, is forecast at a below-average level of 121.5 million tonnes, driven primarily by low plantings. Unfavourable weather conditions also caused a reduction in winter wheat yields in key producing countries, notably **France** and **Romania**, further contributing to the production decline. Similarly, barley production, which is mainly produced in the winter months, is estimated to decrease in 2020 to a below-average level owing to both reduced plantings and yields.

Aggregate production of maize, with the harvest still underway in September, is forecast at an above-average level of 70.5 million tonnes in 2020. Although production was expected to be larger than the current forecasts, hot and dry weather conditions during the summer months dragged down yield expectations for the non-irrigated maize crops, notably in **France** and **Romania**, which led to an overall cut to the production forecast.

CIS IN EUROPE

Above-average cereal production forecast in 2020 amid large plantings

Harvesting of winter cereals (mainly wheat) was completed in August, while harvesting of spring crops is ongoing and is expected

Table 16. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
North America	84.9	84.6	84.9	405.4	388.4	424.1	9.1	8.4	9.9	499.5	481.3	518.9	7.8
Canada	30.9	32.3	34.9	26.8	28.7	29.2	0.0	0.0	0.0	57.7	61.0	64.1	5.0
United States of America	54.0	52.3	50.0	378.6	359.7	394.9	9.1	8.4	9.9	441.7	420.3	454.8	8.2
Europe	257.9	266.0	246.0	254.4	273.3	272.4	4.1	4.1	4.0	516.4	543.4	522.4	-3.9
Belarus	2.4	2.3	2.2	4.7	4.7	4.9	0.0	0.0	0.0	7.1	7.0	7.1	1.2
European Union[1]	150.3	155.7	121.5	157.1	166.7	157.6	2.9	2.9	2.9	310.2	325.3	281.9	-13.3
Russian Federation	73.5	74.5	81.0	41.2	42.3	42.7	1.1	1.1	1.0	115.8	117.9	124.7	5.8
Serbia	2.6	2.5	2.6	6.8	7.9	6.8	0.0	0.0	0.0	9.4	10.4	9.4	-10.1
Ukraine	26.3	28.3	26.0	39.7	46.4	45.9	0.1	0.1	0.1	66.1	74.8	72.0	-3.7
Oceania	22.0	15.6	27.1	14.1	12.2	13.5	0.5	0.1	0.1	36.6	27.9	40.7	45.6
Australia	21.6	15.2	26.7	13.4	11.6	12.9	0.5	0.1	0.1	35.5	26.8	39.6	47.6

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

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

to finalize in November. The aggregate 2020 subregional cereal output is forecast at nearly 206.4 million tonnes, about 8 percent above the five-year average. The result rests mainly on expectations of a large maize output, forecast at 54.2 million tonnes, 20 percent above the average, underpinned by record plantings in **Ukraine**. The subregional wheat output is also expected at an above-average level of 110 million tonnes, mostly reflecting favourable production prospects in **the Russian Federation**, while the subregional barley output is forecast at a near-average 29 million tonnes.

In **the Russian Federation**, the total 2020 cereal output is forecast at 124.4 million tonnes, 8 percent above the five-year average. The aggregate wheat output (winter and spring crops) is forecast at 81 million tonnes, 10 percent above the average level, driven by record high plantings that are officially estimated at 29.4 million hectares amid remunerative prices and strong export demand. Maize production is forecast at 15 million tonnes, 10 percent higher than the average, similarly resulting from large plantings, while barley production is expected at a near-average level of about 19 million tonnes.

In **Ukraine**, cereal production in 2020 is forecast at about 72 million tonnes, 9 percent above the average. Maize production accounts for the bulk of this output and is forecast at a well above-average level of 36 million tonnes, owing to a record area planted that is officially estimated at almost 5.5 million hectares. By contrast, wheat production is forecast at a slightly below-average level of 26 million tonnes as reduced precipitation in March and April affected yields in southern regions.

In **Belarus**, the 2020 aggregate cereal output is forecast at a near-average level of 7 million tonnes. Large maize plantings are expected to result in a well above-average production, while wheat and barley outputs are forecast about 10 percent below the average levels, due to reduced planted areas. Although weather conditions were generally favourable throughout the season, localized rainfall deficits resulted in soil moisture stress and negatively affected yields of winter crops (mainly wheat and barley) in the southeastern Gomel Region (that contributes on average to 15 percent of the total annual cereal production).

In **the Republic of Moldova**, the total 2020 cereal production is forecast at about 3 million tonnes, 4 percent below the five-year average. The wheat output is estimated at 800 000 tonnes, 30 percent below the average level due to reduced precipitation, with particularly scarce amounts in April 2020 that affected yields in key cropping southern areas. By contrast, maize production is expected at an above-average level of 2 million tonnes due to record high plantings.

Cereal exports in 2020/21 marketing year forecast above average

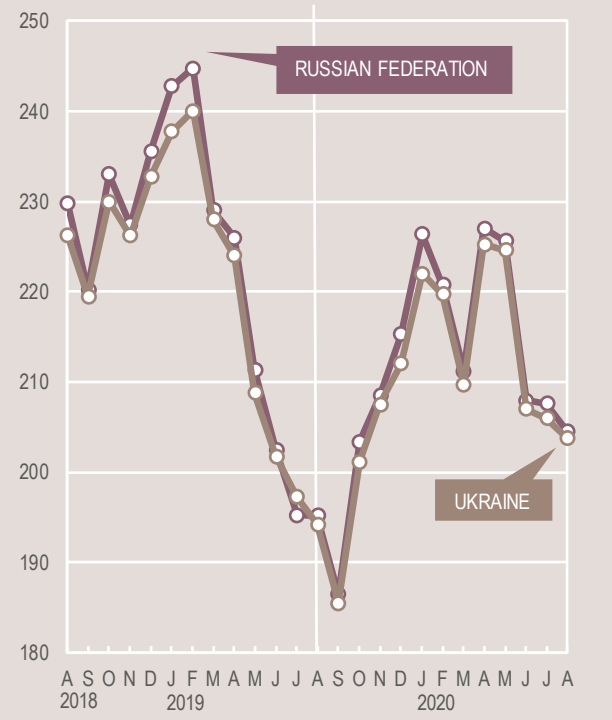
Aggregate cereal exports in the 2020/21 marketing year (July/June) are forecast at 98.1 million tonnes, 10 percent above the five-year average, largely reflecting expectations of significant maize exports from **Ukraine**; total subregional maize exports are forecast at 34 million tonnes. Subregional wheat exports are forecast at 54.1 million tonnes, just above the average level of the previous five years. Strong demand from importing countries and the large 2020 harvest are the two primary factors that are expected to sustain a high level of wheat exports from **the Russian Federation**, forecast at 36.5 million tonnes, 11 percent above the five-year average. By contrast, in **Ukraine** the level of exports has been contained by a Government directive, established in August, that sets the maximum quantity of wheat shipments at 17.5 million tonnes for the 2020/21 marketing year.

Export prices of wheat decreased

In **the Russian Federation** and **Ukraine**, the main wheat exporting countries of the subregion, export prices of milling wheat declined by 8 percent in June with the start of the 2020 winter harvests and remained overall stable in July. In both countries, wholesale prices of wheat grain and wheat flour remained broadly unchanged in June and they seasonally decreased in July, but still remained well above their year-earlier levels.

Prices of potatoes in **the Russian Federation** and in **Belarus**, the main exporter in the subregion, increased strongly between March and June 2020, in line with seasonal trends, and declined in July as market availabilities increased with new supplies from the 2020 harvest.

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



Source : International Grains Council.

OCEANIA

Cereal production to recover in 2020

In **Australia**, harvesting of the winter wheat crop is expected to take place from October 2020 and continues into early 2021. Production is forecast at 26.7 million tonnes, 11.5 million tonnes more than the drought-reduced outturn in 2019 and nearly 25 percent above the previous five-year average. The significant production increase rests on an expansion in plantings, officially estimated at an above-average level of 13 million hectares, and expectations of above-average yields, supported by well-distributed and abundant rains. Similarly, barley production is forecast at 10.6 million tonnes, a 17 percent year-on-year increase and 6 percent above the five-year average, reflecting increased plantings and good yield prospects.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2015/16 - 2019/20	2016/17	2017/18	2018/19	2019/20	2020/21
Ratio of world stocks to utilization (%)						
Wheat	*35.9*	*35.9*	*38.2*	*36.0*	*36.6*	*36.6*
Coarse grains	*28.5*	*28.4*	*29.3*	*28.9*	*28.5*	*28.3*
Rice	*35.5*	*34.8*	*35.3*	*36.8*	*35.9*	*35.1*
Total cereals	***31.9***	***31.7***	***32.9***	***32.4***	***32.1***	***31.8***
Ratio of major cereal exporters' supplies to market requirements (%)[1]	*121.4*	*123.6*	*122.9*	*116.8*	*118.7*	*117.0*
Ratio of major exporters' stocks to their total disappearance (%)[2]						
Wheat	*18.6*	*19.8*	*21.0*	*18.2*	*15.8*	*15.2*
Coarse grains	*15.2*	*14.8*	*15.7*	*16.1*	*16.0*	*16.7*
Rice	*20.9*	*18.9*	*18.1*	*22.6*	*25.4*	*25.3*
Total cereals	***18.2***	***17.8***	***18.3***	***19.0***	***19.1***	***19.1***

	Annual trend growth rate 2010-2019	Change from previous year 2016	2017	2018	2019	2020
Changes in world cereal production (%)	*2.0*	*3.0*	*1.2*	*-1.8*	*2.3*	*2.2*
Changes in cereal production in the LIFDCs (%)	*2.1*	*3.7*	*3.6*	*2.5*	*1.7*	*1.4*
Changes in cereal production in the LIFDCs excluding India (%)	*2.0*	*2.1*	*1.0*	*3.4*	*2.0*	*0.1*

	2017	2018	2019	2020*	Change 2020* over 2019*
Selected cereal price indices[3]					
Wheat	*89.0*	*99.0*	*95.3*	*97.2*	*1.4%*
Maize	*88.6*	*99.1*	*94.6*	*92.7*	*-3.7%*
Rice	*99.0*	*106.3*	*101.5*	*110.3*	*9.5%*

Source: FAO

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

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

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

[3] Price indices: The wheat price index is constructed based on the IGC wheat price index, rebased to 2014-2016 = 100; The coarse grains price index is constructed based on the IGC price indices for maize and barley and one sorghum export quotation, rebased to 2014-2016 = 100. For rice, data refers to the FAO All Rice Price Index, 2014-2016 = 100, which is based on 21 rice export quotations.

*January-August average.

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

	2016	2017	2018	2019	2020 estimate	2021 forecast
TOTAL CEREALS	***794.6***	***839.1***	***879.7***	***868.1***	***880.9***	***895.5***
Wheat	***242.6***	***265.0***	***287.0***	***271.4***	***276.6***	***282.2***
held by:						
- main exporters[2]	*70.4*	*79.9*	*84.3*	*71.5*	*64.2*	*58.7*
- others	*172.2*	*185.1*	*202.7*	*199.9*	*212.4*	*223.5*
Coarse grains	***380.0***	***401.1***	***416.5***	***412.1***	***421.2***	***432.1***
held by:						
- main exporters[2]	*106.4*	*119.8*	*130.4*	*132.2*	*135.9*	*145.5*
- others	*273.6*	*281.3*	*286.1*	*279.9*	*285.3*	*286.6*
Rice (milled basis)	***172.0***	***173.0***	***176.2***	***184.6***	***183.1***	***181.2***
held by:						
- main exporters[2]	*34.5*	*33.2*	*32.3*	*39.6*	*44.5*	*46.4*
- others	*137.5*	*139.8*	*143.9*	*145.0*	*138.6*	*134.8*
Developed countries	***170.8***	***196.9***	***198.5***	***191.2***	***189.4***	***198.8***
Australia	*7.2*	*9.5*	*7.3*	*8.8*	*8.2*	*10.7*
Canada	*10.0*	*12.5*	*11.1*	*9.4*	*10.4*	*12.1*
European Union[3]	*40.8*	*35.2*	*45.3*	*44.6*	*46.9*	*44.1*
Japan	*7.3*	*6.6*	*6.7*	*6.5*	*6.7*	*6.7*
Russian Federation	*11.9*	*20.2*	*22.9*	*14.2*	*12.4*	*12.5*
South Africa	*3.7*	*1.8*	*5.1*	*3.6*	*2.6*	*4.1*
Ukraine	*9.7*	*8.4*	*8.0*	*7.2*	*4.8*	*5.4*
United States of America	*76.1*	*95.8*	*88.8*	*91.3*	*89.1*	*91.7*
Developing countries	***623.8***	***642.1***	***681.3***	***677.0***	***691.5***	***696.7***
Asia	***527.7***	***546.8***	***566.2***	***564.2***	***585.0***	***591.7***
China (Mainland)	*378.2*	*409.4*	*424.4*	*421.9*	*435.6*	*438.7*
India	*42.3*	*34.6*	*42.1*	*50.8*	*57.5*	*59.5*
Indonesia	*10.2*	*9.2*	*10.2*	*11.5*	*9.0*	*7.7*
Iran (Islamic Republic of)	*9.9*	*11.6*	*10.6*	*9.1*	*9.7*	*11.5*
Korea, Republic of	*4.9*	*4.5*	*4.1*	*2.6*	*2.8*	*2.8*
Pakistan	*5.8*	*5.8*	*5.1*	*3.5*	*2.2*	*2.2*
Philippines	*4.0*	*3.7*	*4.1*	*4.7*	*4.0*	*4.1*
Syrian Arab Republic	*1.7*	*1.3*	*1.7*	*1.4*	*2.2*	*2.7*
Turkey	*7.4*	*6.0*	*7.1*	*6.7*	*8.3*	*9.4*
Africa	***56.5***	***54.4***	***61.0***	***61.9***	***57.5***	***57.2***
Algeria	*5.7*	*5.6*	*5.3*	*6.6*	*6.3*	*5.8*
Egypt	*7.7*	*7.4*	*6.8*	*5.6*	*6.7*	*6.6*
Ethiopia	*4.2*	*4.8*	*5.6*	*6.3*	*7.1*	*7.3*
Morocco	*8.4*	*5.9*	*6.7*	*7.3*	*6.0*	*4.4*
Nigeria	*2.9*	*2.5*	*2.9*	*3.8*	*3.1*	*3.0*
Tunisia	*1.0*	*1.0*	*1.1*	*1.0*	*1.2*	*1.2*
Central America	***7.7***	***9.9***	***10.5***	***10.0***	***9.6***	***9.5***
Mexico	*4.6*	*6.5*	*7.6*	*7.5*	*7.3*	*7.3*
South America	***31.3***	***30.5***	***43.0***	***40.3***	***39.0***	***37.9***
Argentina	*7.7*	*7.4*	*12.4*	*13.0*	*12.8*	*9.9*
Brazil	*14.2*	*12.7*	*19.9*	*16.8*	*16.5*	*19.1*

Source: FAO

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

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

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

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

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein[1]	US Soft Red Winter No.2[2]	Argentina Trigo Pan[3]	US No.2 Yellow[2]	Argentina[3]	US No.2 Yellow[2]
Annual (July/June)						
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
2017/18	230	188	203	159	165	174
2018/19	232	210	233	166	166	163
2019/20	220	219	231	163	163	163
Monthly						
2018 - August	250	215	242	162	168	165
2018 - September	242	203	235	156	160	165
2018 - October	240	210	233	160	162	159
2018 - November	232	210	220	160	161	157
2018 - December	240	217	228	167	171	164
2019 - January	238	219	234	166	173	162
2019 - February	234	217	244	170	170	170
2019 - March	223	201	231	167	163	170
2019 - April	213	195	220	161	155	164
2019 - May	212	203	218	172	166	164
2019 - June	227	222	243	196	183	164
2019 - July	216	202	244	188	177	158
2019 - August	203	197	238	162	151	147
2019 - September	200	200	228	157	145	149
2019 - October	212	213	229	168	157	164
2019 - November	220	225	198	167	167	162
2019 - December	225	238	203	168	173	165
2020 - January	237	249	226	172	185	167
2020 - February	230	240	240	170	180	165
2020 - March	227	230	243	162	170	165
2020 - Aprill	232	222	244	145	155	165
2020 - May	223	211	239	144	146	176
2020 - June	216	200	241	149	149	173
2020 - July	220	210	244	151	153	180
2020 - August	221	207	240	148	163	195

Sources: International Grains Council and USDA.

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

[2] Delivered United States Gulf.

[3] Up River f.o.b.

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

		2018/19 or 2019			2019/20 or 2020
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		***26 122.4***	***1 009.6***	***27 132.0***	***28 506.6***
East Africa		***10 371.7***	***698.0***	***11 069.7***	***11 850.0***
Burundi	Jan/Dec	*164.1*	*16.0*	*180.1*	*185.0*
Comoros	Jan/Dec	*58.0*	*0.0*	*58.0*	*61.5*
Djibouti	Jan/Dec	*83.0*	*4.0*	*87.0*	*89.0*
Eritrea	Jan/Dec	*448.3*	*0.0*	*448.3*	*458.5*
Ethiopia	Jan/Dec	*1 810.0*	*54.0*	*1 864.0*	*1 840.0*
Kenya	Oct/Sept	*2 929.3*	*80.0*	*3 009.3*	*3 658.0*
Rwanda	Jan/Dec	*190.0*	*0.0*	*190.0*	*210.0*
Somalia	Aug/Jul	*645.0*	*190.0*	*835.0*	*905.0*
South Sudan	Nov/Oct	*590.0*	*90.0*	*680.0*	*680.0*
Sudan	Nov/Oct	*2 005.0*	*230.0*	*2 235.0*	*2 230.0*
Uganda	Jan/Dec	*495.0*	*23.0*	*518.0*	*548.0*
United Republic of Tanzania	Jun/May	*954.0*	*11.0*	*965.0*	*985.0*
Southern Africa		***2 637.1***	***14.7***	***2 651.8***	***3 115.6***
Lesotho	Apr/Mar	*164.8*	*0.6*	*165.4*	*187.9*
Madagascar	Apr/Mar	*683.0*	*8.0*	*691.0*	*733.7*
Malawi	Apr/Mar	*145.0*	*2.0*	*147.0*	*193.0*
Mozambique	Apr/Mar	*1 367.7*	*1.0*	*1 368.7*	*1 430.0*
Zimbabwe	Apr/Mar	*276.6*	*3.1*	*279.7*	*571.0*
West Africa		***10 577.7***	***140.9***	***10 718.6***	***10 857.4***
Coastal Countries		***5 947.7***	***48.5***	***5 996.2***	***5 665.5***
Benin	Jan/Dec	*511.0*	*6.0*	*517.0*	*207.0*
Côte d'Ivoire	Jan/Dec	*1 910.0*	*5.5*	*1 915.5*	*1 825.5*
Ghana	Jan/Dec	*1 646.7*	*5.0*	*1 651.7*	*1 595.0*
Guinea	Jan/Dec	*782.0*	*5.5*	*787.5*	*957.5*
Liberia	Jan/Dec	*495.0*	*12.0*	*507.0*	*478.0*
Sierra Leone	Jan/Dec	*311.0*	*14.0*	*325.0*	*347.0*
Togo	Jan/Dec	*292.0*	*0.5*	*292.5*	*255.5*
Sahelian Countries		***4 630.0***	***92.4***	***4 722.4***	***5 191.9***
Burkina Faso	Nov/Oct	*713.0*	*11.0*	*724.0*	*732.0*
Chad	Nov/Oct	*151.0*	*38.6*	*189.6*	*194.6*
Gambia	Nov/Oct	*244.0*	*1.5*	*245.5*	*253.0*
Guinea-Bissau	Nov/Oct	*123.0*	*6.3*	*129.3*	*174.3*
Mali	Nov/Oct	*461.2*	*0.0*	*461.2*	*461.2*
Mauritania	Nov/Oct	*531.8*	*13.0*	*544.8*	*545.8*
Niger	Nov/Oct	*600.0*	*18.0*	*618.0*	*696.0*
Senegal	Nov/Oct	*1 806.0*	*4.0*	*1 810.0*	*2 135.0*
Central Africa		***2 535.9***	***156.0***	***2 691.9***	***2 683.6***
Cameroon	Jan/Dec	*1 360.0*	*10.0*	*1 370.0*	*1 360.0*
Congo	Jan/Dec	*334.0*	*2.0*	*336.0*	*306.0*
Central African Republic	Jan/Dec	*73.0*	*23.0*	*96.0*	*95.4*
Democratic Republic of the Congo	Jan/Dec	*750.0*	*120.0*	*870.0*	*900.0*
Sao Tome and Principe	Jan/Dec	*18.9*	*1.0*	*19.9*	*22.2*

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

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

(thousand tonnes)

		2018/19 or 2019			2019/20 or 2020
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
ASIA		***39 763.7***	***1 180.8***	***40 944.5***	***39 735.3***
Cis in Asia		***4 994.6***	***0.1***	***4 994.7***	***5 020.5***
Kyrgyzstan	Jul/Jun	*611.9*	*0.1*	*612.0*	*638.5*
Tajikistan	Jul/Jun	*1 288.0*	*0.0*	*1 288.0*	*1 330.0*
Uzbekistan	Jul/Jun	*3 094.7*	*0.0*	*3 094.7*	*3 052.0*
Far East		***24 187.1***	***365.7***	***24 552.8***	***25 162.8***
Bangladesh	Jul/Jun	*7 573.3*	*92.7*	*7 666.0*	*7 971.5*
Democratic People's Republic of Korea	Nov/Oct	*1 314.0*	*271.0*	*1 585.0*	_*
India	Apr/Mar	*302.7*	*0.0*	*302.7*	*646.5*
Nepal	Jul/Jun	*1 183.8*	*2.0*	*1 185.8*	*1 080.8*
Viet Nam	Jul/Jun	*13 813.3*	*0.0*	*13 813.3*	*15 464.0*
Near East		***10 582.0***	***815.0***	***11 397.0***	***9 552.0***
Afghanistan	Jul/Jun	*3 212.0*	*100.0*	*3 312.0*	*2 292.0*
Syrian Arab Republic	Jul/Jun	*3 390.0*	*290.0*	*3 680.0*	*2 830.0*
Yemen	Jan/Dec	*3 980.0*	*425.0*	*4 405.0*	*4 430.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 414.6***	***10.1***	***1 424.7***	***1 479.6***
Haiti	Jul/Jun	*784.9*	*10.1*	*795.0*	*824.6*
Nicaragua	Jul/Jun	*629.7*	*0.0*	*629.7*	*655.0*
OCEANIA		***62.0***	***0.0***	***62.0***	***62.0***
Solomon Islands	Jan/Dec	*62.0*	*0.0*	*62.0*	*62.0*
TOTAL		***67 362.7***	***2 200.5***	***69 563.2***	***69 783.5***

Source: FAO

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

* Estimates not yet available.

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2020/2021
(thousand tonnes)

		2019/20			2020/21
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		***4 764.9***	***240.7***	***5 005.6***	***5 517.7***
East Africa		***1 669.0***	***221.0***	***1 890.0***	***1 945.0***
Somalia	Aug/Jul	*695.0*	*210.0*	*905.0*	*885.0*
United Republic of Tanzania	Jun/May	*974.0*	*11.0*	*985.0*	*1 060.0*
Southern Africa		***3 095.9***	***19.7***	***3 115.6***	***3 572.7***
Lesotho	Apr/Mar	*187.3*	*0.6*	*187.9*	*233.1*
Madagascar	Apr/Mar	*725.7*	*8.0*	*733.7*	*716.0*
Malawi	Apr/Mar	*190.0*	*3.0*	*193.0*	*214.5*
Mozambique	Apr/Mar	*1 425.0*	*5.0*	*1 430.0*	*1 466.0*
Zimbabwe	Apr/Mar	*567.9*	*3.1*	*571.0*	*943.1*
ASIA		***34 844.2***	***461.1***	***35 305.3***	***35 172.3***
CIS in Asia		***5 020.4***	***0.1***	***5 020.5***	***5 050.5***
Kyrgyzstan	Jul/Jun	*638.4*	*0.1*	*638.5*	*639.5*
Tajikistan	Jul/Jun	*1 330.0*	*0.0*	*1 330.0*	*1 264.0*
Uzbekistan	Jul/Jun	*3 052.0*	*0.0*	*3 052.0*	*3 147.0*
Far East		***25 091.8***	***71.0***	***25 162.8***	***25 019.8***
Bangladesh	Jul/Jun	*7 902.5*	*69.0*	*7 971.5*	*8 155.0*
India	Apr/Mar	*646.5*	*0.0*	*646.5*	*514.0*
Nepal	Jul/Jun	*1 078.8*	*2.0*	*1 080.8*	*1 250.8*
Viet Nam	Jul/Jun	*15 464.0*	*0.0*	*15 464.0*	*15 100.0*
Near East		***4 732.0***	***390.0***	***5 122.0***	***5 102.0***
Afghanistan	Jul/Jun	*2 192.0*	*100.0*	*2 292.0*	*2 332.0*
Syrian Arab Republic	Jul/Jun	*2 540.0*	*290.0*	*2 830.0*	*2 770.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 469.5***	***10.1***	***1 479.6***	***1 465.1***
Haiti	Jul/Jun	*814.5*	*10.1*	*824.6*	*850.1*
Nicaragua	Jul/Jun	*655.0*	*0.0*	*655.0*	*615.0*
TOTAL		***41 078.6***	***711.9***	***41 790.5***	***42 155.1***

Source: FAO

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

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

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

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