



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, 34 of which in Africa, continue to be in need of external assistance for food. The impact of the COVID-19 pandemic, particularly in terms of income losses, is an important driver of the levels of global food insecurity, exacerbating and intensifying already fragile conditions. Conflicts, weather events and pests remain critical factors underpinning the high levels of severe food insecurity.

Asia	1.6
Africa	1.1
Central America and the Caribbean	2.0
South America	0.9
North America	5.1
Europe	-5.4
Oceania	56.3
World	1.3

WORLD

Cereal production 2020 over 2019

(yearly percentage change)

+ 1.3%

REGIONAL HIGHLIGHTS

AFRICA Floods have affected multiple countries across East Africa and West Africa, resulting in crop losses, although above-average cereal outputs are still forecast in both subregions in 2020. Conflicts continue to plague several countries in the two subregions as well as in Central Africa, undermining agricultural production and livelihoods more generally.

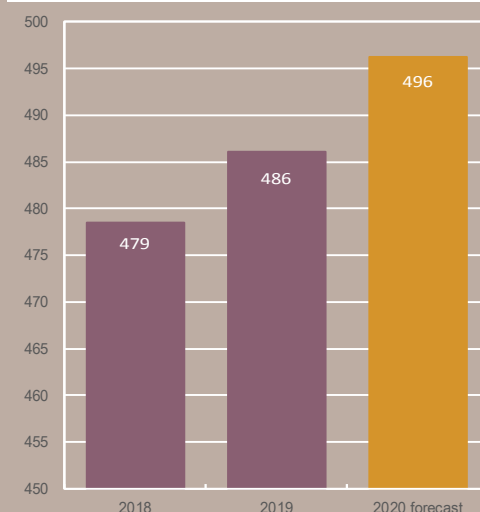
ASIA An all-time high paddy output is estimated in the Far East in 2020, primarily reflecting area expansions. In the Near East, improved security conditions enabled the Syrian Arab Republic to produce a well above-average cereal crop in 2020, while conducive weather supported harvest upturns across most of the subregion. In CIS Asia, cereal production declined in Kazakhstan, but outputs increased elsewhere.

LATIN AMERICA AND THE CARIBBEAN Hurricanes caused widespread damage to crops and livelihoods in Central America, with cereal harvests expected to decline as a result. In South America, the aggregate cereal output reached a record high in 2020 for the second consecutive year, underpinned by all-time high sown area.

LIFDC
Cereal production 2020 over 2019

+ 2.1%

(million tonnes)



Required citation:

FAO. 2020. *Crop Prospects and Food Situation* - Quarterly Global Report No. 4, December 2020. Rome.
<https://doi.org/10.4060/cb2334en>

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ISBN 978-92-5-133680-9

ISSN 2707-2223 [Print]

ISSN 2707-2231 [Online]

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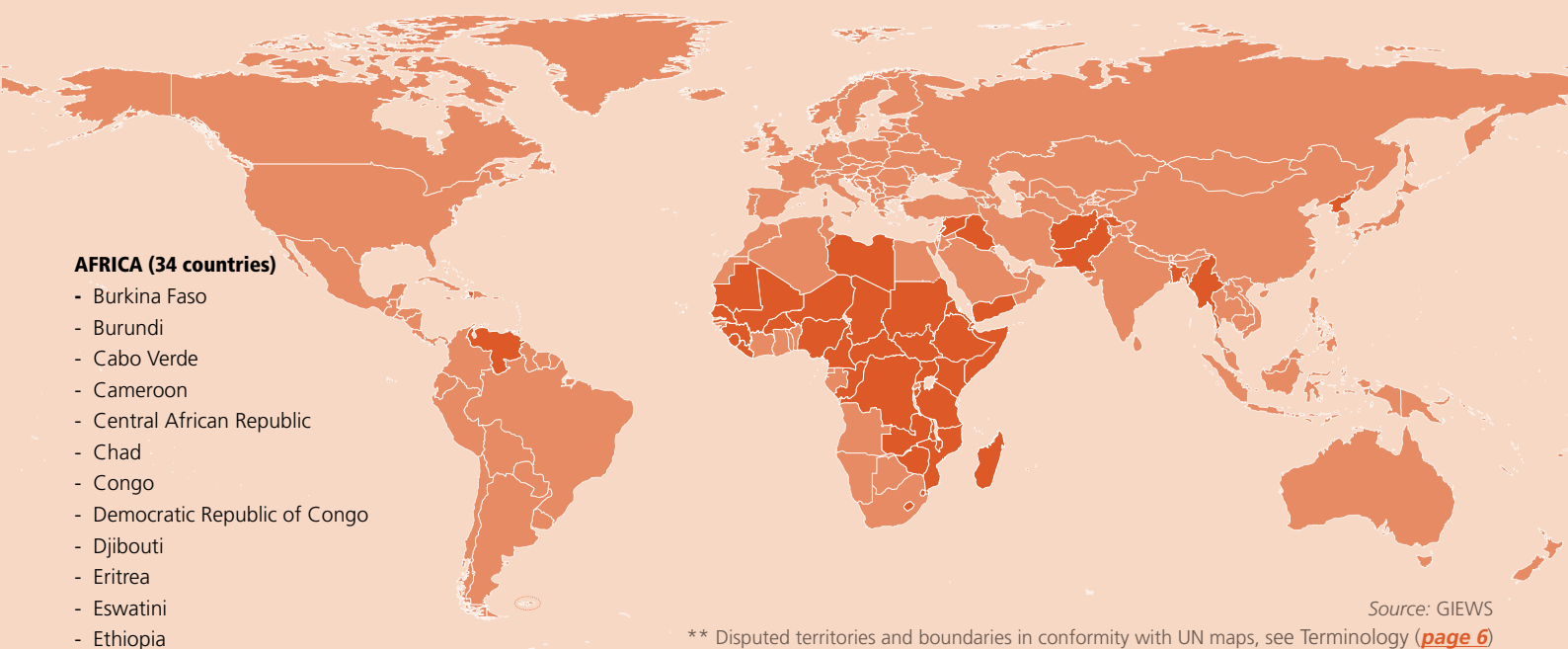
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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



The following countries have been affected, to varying degrees, by the **COVID-19 pandemic** and as a result, the pandemic is considered as a key factor that has worsened food insecurity and increased the need for humanitarian assistance, although it may not be mentioned specifically below.

AFRICA (34 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, population displacements

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3: "Crisis" and above) is estimated at 1.9 million in the September 2020-April 2021 period, a 20 percent yearly increase. The escalation of the situation results from the persistent conflict and the upsurge of violence between armed groups that has contributed to the high level of food prices and resulted in widespread population displacements.

Kenya

Floods, desert locusts

- About 850 000 people are estimated to be severely food insecure in the October-December 2020 period in the drought-prone counties classified as rural arid and semi-arid lands covering most of the country, down from 3.1 million people in late 2019 due to favourable rains during the last two consecutive seasons. By contrast, the food

security situation significantly deteriorated in urban areas, where about 1 million people are estimated to be food insecure due to the socio-economic impact of the pandemic on the livelihoods of vulnerable households.

- As of October, about 124 000 individuals had been affected by floods which were triggered by torrential rains since June.

Somalia

Floods, civil insecurity, desert locusts

- About 2.1 million people are estimated to be in need of emergency assistance in the October-December 2020 period.
- As of October, about 633 000 individuals had been affected by floods which were triggered by torrential rains since June.

Zimbabwe

Below-average cereal harvest, high food prices and economic downturn

- An estimated 3.38 million people are projected to be in need of urgent humanitarian assistance between the January-March 2021 period, primarily on account of the reduced agricultural output in 2020 and significantly high food prices.
- Without the current planned assistance, this number would be expected to rise considerably.

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, and as a result of the socio-economic impact of the pandemic on the livelihoods of vulnerable households.

Chad

Civil insecurity

- According to the latest "Cadre Harmonisé" analysis, about 600 000 people are estimated to be in Phase 3: "Crisis" and above in the October-December 2020 period.
- About 336 000 people were displaced due to insecurity in the Lake Chad Region. In addition, nearly 484 000 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

- According to the latest IPC analysis, carried out in July 2020, 21.8 million people (33 percent of the analyzed population) were estimated to be severely food insecure during the July-December 2020 period, due to the ongoing civil insecurity and the impacts of measures related 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, impact of previous droughts

- About 6.7 million people are estimated to be severely food insecure between October and December 2020 mainly

in SNNP, Oromia and Somali regions. The main drivers are a below-average "Belg" harvest, localized crop and pasture losses due to locusts and the negative impact of the restrictive measures related to the COVID-19 pandemic on incomes and food prices.

- As of October, about 1.1 million individuals had been affected by floods which were triggered by torrential rains since June.

Niger

Civil conflict

- According to the latest "Cadre Harmonisé" analysis, about 1.2 million people are assessed to be in need of humanitarian assistance between October and December 2020.
- An estimated 257 000 people have been displaced in Diffa, Tahoua and Tillabery regions due to the civil conflicts. In addition, the country hosts almost 230 000 refugees, mainly from Nigeria and Mali.

Nigeria

Persisting conflict in northern areas

- According to the latest "Cadre Harmonisé" analysis, about 9.8 million people were assessed to need humanitarian assistance between October and December 2020.
- Over 2.7 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 insecurity conditions.

South Sudan

Economic downturn, civil insecurity, floods, 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, high food prices and widespread floods. About 6.48 million people (55 percent of the total population) were estimated to be severely food insecure in the May-July 2020 period.
- This projection was conducted prior to the COVID-19 pandemic and widespread floods, which had affected about 856 000 individuals, as of October 2020. As a result, the current severity and prevalence of food insecurity is likely to be substantially higher.

- Particular concern exists for about 500 000 people in Jonglei State, who were already expected to face IPC Phase 4: "Emergency" food insecurity prior to the floods and are now at risk of famine if food assistance is not urgently scaled up.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the latest "Cadre Harmonisé" analysis, about 2 million people were estimated to need external food assistance during the October-December 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

Lingering effects of drought

- 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, population displacements

- According to the analysis conducted by FAO, the World Food Programme (WFP) and the Government, about 4.9 million people (18 percent of the total population) were estimated to be in severe acute food insecurity in the second semester of 2020, well above the previous year's level. The escalation is the result of the effects of the COVID-19 pandemic, which has exacerbated the impacts of the persisting conflict.

Congo

Floods

- The Government declared a state of humanitarian emergency on 3 November 2020, after torrential rains in the north of the country triggered flooding, causing population displacements as well as extensive crop and livestock losses.
- In addition, 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 study by the Government and WFP.

Eswatini

Localized shortfalls in production, reduction in income-generating activities

- About 366 000 people were projected to be food insecure and in need of humanitarian assistance during the October 2020-March 2021 period, higher than the estimate for the same period in 2019/20. The deterioration reflects localized production shortfalls, high food prices and the loss of income-generating activities due to the COVID-19-induced economic downturn.

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 5 500 refugees were residing in the country.

Lesotho

Localized shortfalls in production, loss of income-generating activities

- About 582 000 people are projected to face acute food insecurity between October 2020 and March 2021, 10 percent higher than the corresponding period in 2019/20. The 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 latest "Cadre Harmonisé" analysis, about 450 750 people are estimated to be in Phase 3: "Crisis" and above in the October-December 2020 period. The country is also hosting approximately 8 200 refugees.

Libya

Civil insecurity, political instability, high food 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, however, likely to be higher,

reflecting the continued depreciation of the currency, increasing food prices and the COVID-19 constraints on labour opportunities.

Madagascar

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

- The number of food insecure people in southern and southeastern regions in the January-March 2021 period is expected to be higher than the 728 000 people estimated in same period in 2020, pending the results from a recently conducted assessments.
- The poorer outlook reflects the impacts of the COVID-19 pandemic, particularly the loss of incomes due to the economic slowdown, but also underpinned by the reduced cereal output in southern regions.

Malawi

Localized production shortfalls, economic slowdown

- An estimated 2.62 million people are assessed to be food insecure between October 2020 and March 2021, of which 2 million live in rural areas and the remaining 600 000 in urban areas. Despite the upturn in cereal production in 2020, the effects of the COVID-19 pandemic have curtailed access to food through income losses, which has sustained the high levels of food insecurity.

Mali

Civil insecurity

- According to the latest "Cadre Harmonisé" analysis, about 437 00 people are estimated to be in Phase 3: "Crisis" and above in the October-December 2020 period.
- Over 287 000 people have been displaced in central and northern parts of the country. In addition, the country hosts approximately 47 000 refugees.

Mauritania

Poor performance of agro-pastoral cropping season

- According to the latest "Cadre Harmonisé" analysis, about 178 000 people are assessed to be in need of humanitarian assistance between October and December 2020.
- About 65 500 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 national food insecurity situation is expected to be worse, due to income losses associated with the pandemic-induced economic downturn and shortfalls in staple food production in southern regions. Continued insecurity in northern areas has also severely aggravated conditions in affected parts.

Namibia

Localized shortfalls in staple food production, economic slowdown

- About 441 000 people are estimated to be food insecure and need of humanitarian assistance between October 2020 and March 2021.
- Although the availability of foods is adequate and stable, the negative effects of the COVID-19 pandemic, primarily income and job losses, have constrained households' access to food.

Senegal

Localized shortfalls in cereal production

- According to the latest "Cadre Harmonisé" analysis, about 512 000 people are estimated to be in need of humanitarian assistance between October and December 2020.
- An estimated 14 500 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

High food prices

- About 852 000 people are estimated to be severely food insecure during the October-December 2020 period.

Sudan

Conflict, civil insecurity, floods, soaring food prices

- The number of severely food insecure people was estimated at 7.1 million in the October-December 2020 period.
- As of October 2020, about 875 000 individuals had been affected by floods which were triggered by torrential rains since June.

Uganda

Floods, refugee influx

- The number of severely food insecure people was estimated at 2 million in the

September 2020-January 2021 period in the Karamoja Region, urban areas, refugee settlements and host communities. In traditionally food secure urban areas, including the capital, Kampala, more than 600 000 people are food insecure due to the restrictive measures introduced to curb the spread of the COVID-19 virus.

- As of October 2020, about 17 000 individuals had been affected by floods which were triggered by torrential rains since June.
- About 885 000 refugees from South Sudan and about 418 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

United Republic of Tanzania

Localized shortfalls in staple food production

- 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 shortfalls in cereal production, high food prices

- 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

- According to the Government, 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 food prices and unemployment resulting from the 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 assessments by 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 numbers of people in southern parts.

Yemen

Conflict, poverty, floods, high food and fuel prices

- Over 80 percent (24.3 million people) of the total population 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 due with the limited income-earning opportunities and decline in remittances.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict, population displacement, economic slowdown

- Between August and October 2020, it was estimated that a total of 11.15 million people were facing high levels of acute food insecurity (IPC Phase 3 or above) and required urgent humanitarian action. Between November 2020 and March 2021, during the lean season period, around

13.15 million people are likely to experience high levels of acute food insecurity.

Bangladesh

Economic constraints, monsoon floods

- Food insecurity levels have increased due to income losses and a decline in remittances as a result of the COVID-19 pandemic.
- Tropical Cyclone Amphan in May 2020 in southwestern parts of the country and widespread floods in July 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 (October 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 resources of the local community.

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

Conflict, economic constraints

- Persistent conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large scale population displacement particularly since 2017. 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.
- Income losses and a decline in remittances due to the impact of the COVID-19 pandemic has affected the food security situation of vulnerable households.

Pakistan

Population displacement, high prices of the main food staple

- 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 host communities.

- Prices of wheat, the country's main staple, have been at high levels since the beginning of the year and reached record levels in most markets in October 2020, constraining access to food.
- About 1.18 million people were 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

- The total number of refugees and migrants from the country is estimated at 5.4 million, with the largest populations located in Colombia (1.7 million), Peru (1 million) and Chile (457 000). Humanitarian needs for refugees and migrants are significant. Due to losses of income-generating opportunities in the host countries amid the COVID-19 pandemic, about 135 000 migrants came back to the country, putting additional strains on the already limited resources.
- According to WFP's food security assessment, conducted in the third quarter of 2019, about 2.3 million people in Venezuela (8 percent of the total population within the country) were severely food insecure, mainly as a result of the high food prices.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Reduced agricultural production 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 high food prices. Reduced 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 37 \(North America, Europe and Oceania\)](#)

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GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview¹

World 2020 cereal production forecast reduced further

FAO's forecast for global cereal **production** in 2020 has been lowered for the third consecutive month in December, with downward revisions for all the major cereals. Nonetheless, global cereal production is still expected to reach a record high level of 2 742 million tonnes, 1.3 percent above the previous year's outturn.

Forecast at 1 472 million tonnes in 2020, world coarse grains production has been cut by 6.8 million tonnes in December compared to the preceding month. The bulk of the revision reflects reduced yield prospects for maize in the United States of America which, however, is still on course to harvest

its third largest crop on record, and in Ukraine. These reductions more than outweigh a lifting of Serbia's maize production forecast, which is now seen to reach an all-time high in 2020. The forecast for world wheat production in 2020 has been trimmed marginally in December since the previous month to 761.7 million tonnes, putting this year's output at a comparable level with the 2019 outturn. The downward revision reflects reduced forecasts for Argentina and Brazil, on account of recent sparse rains that curbed yield expectations, as well as in Kazakhstan, offsetting an increase made to the production estimate in the Russian Federation. As for rice, production prospects have deteriorated in Bangladesh and Viet Nam, in both cases reflecting the adverse impact of weather on secondary crops. However, the foreseen lower output in both countries, alongside other smaller downward

Table 1. World cereal production¹
(million tonnes)

	2018	2019 estimate	2020 forecast	Change: 2020 over 2019 (%)
Asia	1 184.9	1 196.0	1 215.0	1.6
Far East	1 085.5	1 089.6	1 104.5	1.4
Near East	65.2	72.6	76.2	4.9
CIS in Asia	34.2	33.8	34.4	1.6
Africa	198.4	190.8	192.9	1.1
North Africa	38.0	36.2	32.7	-9.5
West Africa	66.0	65.9	63.3	-4.0
Central Africa	6.1	6.0	5.9	-1.5
East Africa	56.6	54.1	54.9	1.6
Southern Africa	31.8	28.6	36.1	26.0
Central America and the Caribbean	42.5	42.4	43.3	2.0
South America	197.4	228.4	230.4	0.9
North America	495.4	479.3	503.7	5.1
Europe	497.2	541.9	512.7	-5.4
European Union ²	294.1	324.1	275.8	-14.9
CIS in Europe	188.0	202.7	201.0	-0.8
Oceania	30.9	27.9	43.6	56.3
World	2 646.7	2 706.7	2 741.7	1.3
Developing countries	1 614.6	1 648.8	1 672.7	1.5
Developed countries	1 032.1	1 057.9	1 069.0	1.0
- wheat	732.5	762.0	761.7	0.0
- coarse grains	1 407.7	1 444.0	1 471.5	1.9
- rice (milled)	506.5	500.7	508.4	1.5

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 December 2020.

revisions, are partly compensated by an upgrade for Pakistan, where preliminary official assessments indicate that another robust area expansion should lead to a record 2020 harvest. As a result, world rice production in 2020 is now predicted to reach an all-time high of 508.4 million tonnes, 1.5 percent above the 2019 reduced level but marginally down from the previous month's expectations.

Looking further ahead, planting of the 2021 winter wheat crop in the Northern Hemisphere is underway, and sowings in several major producing countries are foreseen to increase driven by remunerative prices, although recent dry weather could curb planting expansions and hinder yields. In the United States of America, sowing operations are progressing at a fast pace, but dry weather conditions, influenced by the prevailing La Niña weather phenomenon, have resulted in moderately poorer crop conditions compared to the previous year. In Europe, robust export demand and rising prices have incentivized an area expansion in the Russian Federation, with sowings officially estimated at 19.2 million hectares, while limited rainfall in Ukraine caused 2021 sowings to fall to a below-average level. Following a reduced acreage in 2019, wheat sowings in the European Union are expected to recover substantially. In Asia, weather conditions have been generally conducive for the 2021 wheat crop and, supported by profitable prices, acreages in China (mainland), India and Pakistan are all foreseen to increase.

World cereal **utilization** in 2020/21 is forecast at a record 2 744 million tonnes, 1.9 percent higher than in 2019/20. The forecast for total utilization of coarse grains in 2020/21 is pegged at 1 477 million tonnes, up 2.6 percent from the previous season stemming mostly from increased feed use, especially of maize and sorghum in China (mainland), as well as other uses, resulting from a rise in the production of maize-based ethanol in Brazil and the United States of America. At 757.6 million tonnes, global wheat utilization in 2020/21 is expected to exceed the

estimated level for 2019/20 by 1.1 percent, largely as a result of a foreseen increase in food use. Global rice utilization in 2020/21 is anticipated to reach 510.3 million tonnes, unchanged from last month's forecast and up 1.5 percent from 2019/20.

The forecast for world cereal **stocks** by the close of seasons in 2021 has been cut by 9.6 million tonnes in December since the previous month to 866.4 million tonnes, with stocks now seen falling below their opening level by 0.7 percent. At this level, the global cereal stock-to-use ratio would decline from 31.8 percent in 2019/20 to 30.7 percent in 2020/21, a five-year low but still a relatively comfortable level. At 402.5 million tonnes, total coarse grain inventories are seen lower by more than 10 million tonnes than earlier anticipated, largely reflecting a downward revision to maize inventories in the United States of America. With this month's revision, world coarse grain inventories would fall by 2.8 percent below their opening levels. By contrast, the forecast for world wheat inventories has been scaled up by almost 2 million tonnes since November, mainly on expectations of larger stocks in Canada, China (mainland) and the European Union, and is now pegged at 282.9 million tonnes, up 2.3 percent from the opening levels. Wheat stock buildups in China (mainland) account for the bulk of the expected year-on-year expansion in global inventories. World rice stocks at the close of 2020/21 are pegged at 181.0 million tonnes, down 0.4 percent from their opening levels and 1.0 million tonnes below last month's expectations. The monthly revision primarily reflects an anticipated decline in reserves in India owing to improved export prospects for the country. Stocks in India are nevertheless still predicted at an all-time record. Indeed, the expected accumulation in India, alongside an even higher-than-previously anticipated build-up in Thailand, is seen driving an increase in the major exporters' aggregate rice reserves.

World **trade** in cereals in 2020/21 is forecast at 454.6 million tonnes, up 3.2 million tonnes in December compared to the previous month and now 3.4 percent higher than the 2019/20 level. The forecast for world trade in coarse grains in 2020/21 (July/June) is up 2.7 million tonnes month on month and is now pegged at nearly 223 million tonnes and surpassing the previous season's record by 5.7 percent. This month's upward revision primarily stems from a faster-than-expected pace in maize sales by the United States of America, driven by continued strong purchases by China (mainland). At 184.5 million tonnes, world

wheat trade in 2020/21 (July/June) is forecast to remain near the 2019/20 level, unchanged since last month as greater expected sales from the Russian Federation balance a downward revision to Argentina's exports as a result of lower crop prospects. World trade in rice in 2021 (January-December) is now forecast at 47.6 million tonnes, 6.9 percent above the revised 2020 forecast of 44.5 million tonnes. Upward import revisions are introduced for various Near Eastern and African countries this month, more than compensating for a somewhat less buoyant import outlook for the Philippines.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2018/19	2019/20 estimate	2020/21 forecast	Change: 2020/21 over 2019/20 (%)
Production¹	2 646.7	2 706.7	2 741.7	1.3
Developing countries	1 614.6	1 648.8	1 672.7	1.5
Developed countries	1 032.1	1 057.9	1 069.0	1.0
Trade²	411.9	439.6	454.6	3.4
Developing countries	145.8	165.2	164.6	-0.3
Developed countries	266.1	274.4	290.0	5.7
Utilization	2 675.2	2 691.9	2 744.4	1.9
Developing countries	1 813.6	1 829.4	1 882.1	2.9
Developed countries	861.5	862.5	862.3	0.0
Per caput cereal food use (kg per year)	149.5	149.6	150.3	0.5
Stocks³	869.8	872.5	866.4	-0.7
Developing countries	678.7	694.2	693.2	-0.1
Developed countries	191.1	178.3	173.3	-2.8
World stock-to-use ratio (%)	32.3	31.8	30.7	-3.3

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 OVERVIEW²

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 production¹	478.5	486.1	496.3	2.1
excluding India	255.3	259.9	260.8	0.4
Utilization	516.2	528.2	542.0	2.6
Food use	391.6	399.3	408.4	2.3
excluding India	222.6	228.1	231.7	1.6
Per caput cereal food use (kg per year)	151.9	152.5	153.5	0.7
excluding India	154.8	155.3	154.4	-0.6
Feed	55.4	58.4	61.0	4.5
excluding India	40.2	42.0	43.0	2.4
End of season stocks²	106.9	110.1	112.1	1.8
excluding India	59.3	56.6	55.4	-2.1

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

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

Table 4. Cereal production¹ of LIFDCs

(million tonnes)

	5-year average	2019 estimate	2020 forecast	Change: 2020 over 2019 (%)
Africa (37 countries)	104.9	109.7	110.1	0.4
East Africa	52.6	54.1	54.9	1.6
Southern Africa	9.9	10.2	11.0	8.2
West Africa	36.6	39.4	38.2	-3.1
Central Africa	5.9	6.0	5.9	-1.5
Asia (11 countries)	357.2	375.3	385.0	2.6
CIS in Asia	10.7	11.1	10.7	-3.4
Far East	337.7	353.6	363.3	2.7
India	252.4	266.0	276.4	3.9
Near East	8.7	10.6	11.1	4.7
Central America and the Caribbean (2 countries)	1.1	1.1	1.1	1.4
Oceania (1 country)	0.0	0.0	0.0	0.0
LIFDCs (51 countries)	463.2	486.1	496.3	2.1

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.

Cereal production in LIFDCs increases in 2020, driven by Far East Asian and Southern African countries

The bulk of the 2020 cereal crops in Low-Income Food-Deficit Countries (LIFDCs) has been harvested and planting of the 2021 crops is already underway in some of them. The 2020 aggregate production of LIFDCs is pegged at 496.3 million tonnes, about 10 million tonnes more than the previous year and 7 percent higher than the five-year average, mostly reflecting large outputs in *Southern Africa* and *Far East Asia*.

Among Asian LIFDCs, aggregate cereal production is forecast at 385 million tonnes in 2020, 2.6 percent above the previous year's level. Most of the increase relates to a production upturn in **India**, the largest LIFDC cereal producer. Despite the impact of floods, an increase was also registered in **Bangladesh**. Torrential rains affected crops in **Nepal**, where the 2020 harvest is nevertheless estimated to have remained at an above-average level and similar to the previous year. By contrast, cereal production in **Viet Nam** is forecast to fall, partly explained by a decline in maize production as farmers switched to more profitable horticulture crops. Improved security conditions helped foster a production increase in **the Syrian Arab Republic**, where favourable weather conditions also supported an upturn in crop yields. Among the *CIS Asian* countries, a production decline in **Uzbekistan** dragged down the aggregate cereal output, offsetting small production increases in **Kyrgyzstan** and **Tajikistan**. However, the aggregate cereal outturn remains at a near-average level.

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

In *Africa*, the largest production increases were registered in *Southern African* countries as favourable weather conditions in the second half of the season pushed up crop yields to average to above-average levels in **Malawi, Lesotho, Madagascar** and **Mozambique**. In **Zimbabwe**, the cereal harvest in 2020 was estimated at a below-average level, despite a moderate yearly increase, as poor rains and constrained access to agricultural inputs due to high inflation rates curtailed crop productivity. In *East Africa*, although floods in several countries caused extensive crop losses, the abundant seasonal rainfall had an overall positive impact on cereal crops and aggregate production in 2020 is foreseen to increase, maintaining an above-average output. The largest production increases are forecast in **the Sudan** and **the United Republic of Tanzania**, while moderate increases are also expected in **Kenya** and **Uganda**. Desert locust outbreaks have affected crops and pastures, particularly in **Somalia, Kenya** and **Ethiopia**, but the large scale control operations have contained the losses. In *West Africa*, aggregate production is estimated to have decreased in 2020 compared to the high level in 2019, but the overall outturn remains above the average. Most countries

are estimated to have registered yearly production declines of up to 17 percent, while small production increases are estimated in **Niger** and **Côte d'Ivoire**. In *Central Africa*, where the effects of the conflicts continue to impede agricultural activities, cereal production is forecast to be virtually unchanged on a yearly basis and to remain at a near-average level.

Import requirements rise moderately in 2020/21

The cereal import requirement for LIFDCs in the 2020/21 marketing year is estimated at 73.9 million tonnes, up 3.7 million tonnes on a yearly basis. The larger needs are primarily driven by increased requirements in *West African* countries, due to production declines in 2020. In *Southern Africa*, although the production increases tempered import needs, aggregate imports are forecast to increase and this is almost entirely due to the large import requirements in **Zimbabwe**. Small increases in import requirements are estimated in *Central African* and *East African* countries, but the expected growth is in line with recent yearly rates. Imports are also forecast to increase in several *Asian* countries, notably in **Afghanistan** and **Nepal**.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

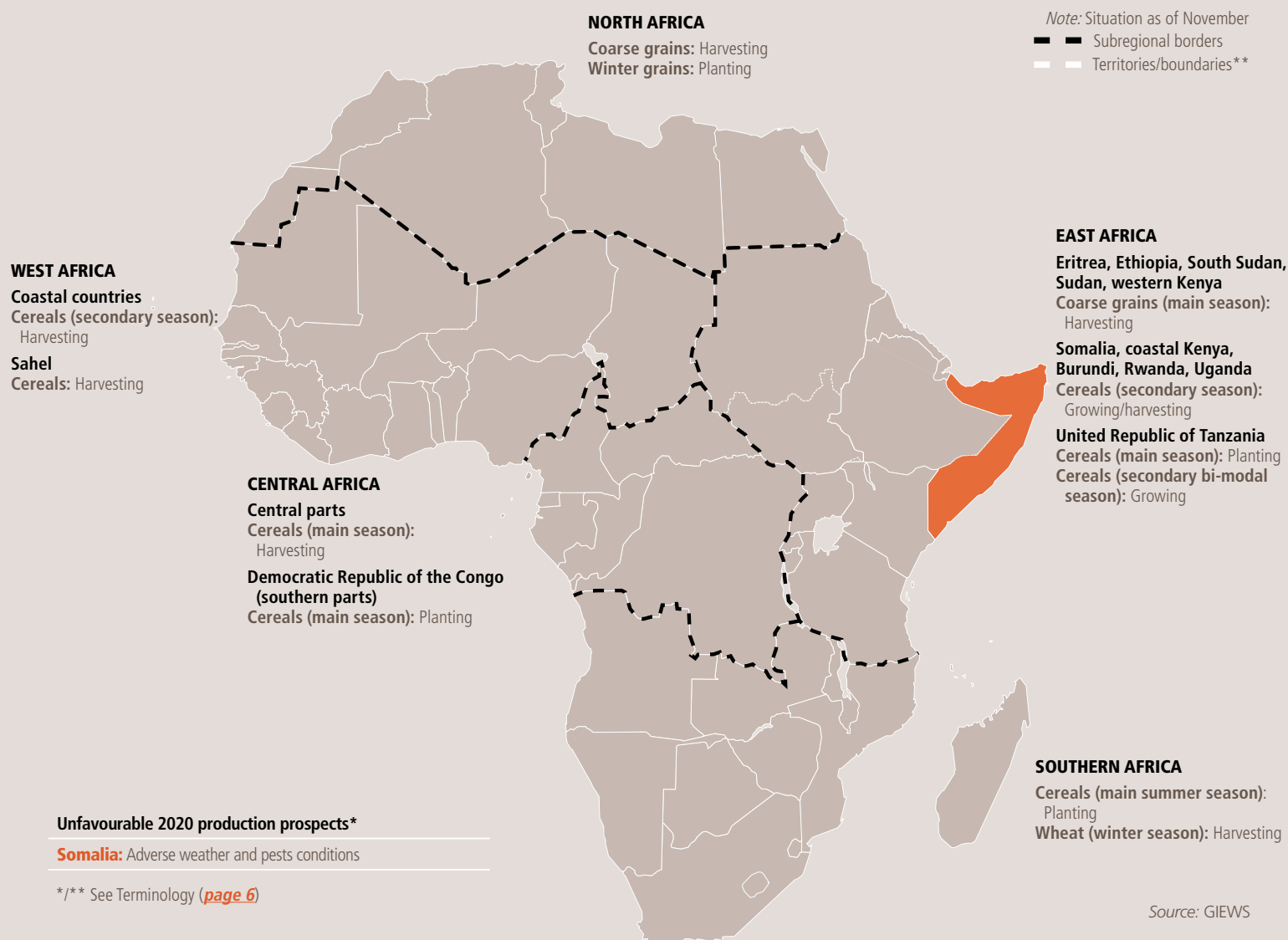
	2018/19 or 2019	2019/20 or 2020		2020/21 or 2021	
	Actual imports	Import forecast	of which food aid	Import requirement ¹	of which food aid
Africa (37 countries)	27 133	29 137	1 169	31 551	1 159
East Africa	11 060	11 950	818	12 362	818
Southern Africa	2 667	3 476	20	3 800	14
West Africa	10 730	11 027	175	12 541	170
Central Africa	2 677	2 684	156	2 848	156
Asia (11 countries)	40 917	39 514	1 001	40 813	1 032
CIS in Asia	4 935	4 744	0	4 816	0
Far East	24 580	25 233	191	26 356	202
Near East	11 402	9 537	810	9 642	830
Central America and the Caribbean (2 countries)	1 425	1 480	10	1 492	10
Oceania (1 country)	62	62	0	64	0
LIFDC (51 countries)	69 536	70 192	2 180	73 920	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

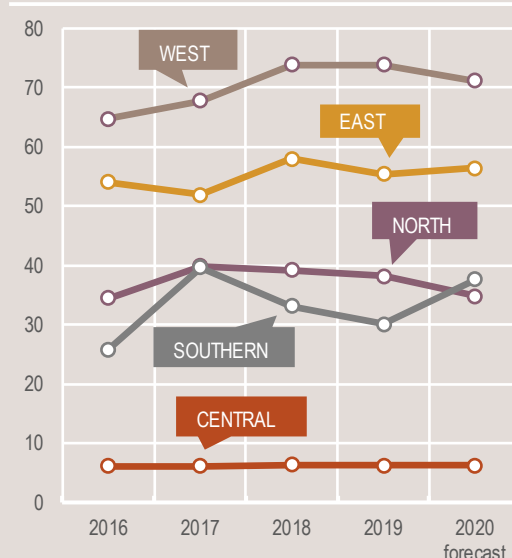


Africa Production Overview

Aggregate cereal production in Africa, with the bulk of the 2020 crops harvested, is forecast at 206 million tonnes, 2 million tonnes more than the previous year and 4 percent higher than the five-year average. This year's production upturn is almost entirely related to above-average harvests in Southern Africa, reflecting overall favourable weather conditions that increased yields and the area harvested. Torrential rains triggered widespread floods across East Africa that caused extensive crop losses and as a result, aggregate cereal production is foreseen to increase only moderately in 2020, remaining above the average. Large-scale control operations against desert locusts have also prevented a more significant impact on crop production. In West Africa, cereal production is seen to decrease although remain above the average, as adverse weather and persistent conflicts continued to impact agricultural activities. In North Africa, drought conditions dragged down cereal production in 2020, particularly affecting harvests in Morocco, while in Central Africa, protracted conflicts in several countries continue to limit growth in agricultural production and conditions were further aggravated by recent floods.

Planting of the 2021 crops is underway in North Africa, where more rain is needed, and in Southern African countries, amid a generally favourable start to the season.

Cereal production
(million tonnes)



NORTH AFRICA



More rain needed for establishment of 2021 winter crops

Depending on the availability of soil moisture for proper crop establishment, sowing of the winter wheat and coarse grains crops usually starts in late October and continues until the end of the year. As of mid-November, significant soil moisture deficits were reported in western growing areas, including **Morocco**, **Algeria**, **Tunisia** and the western part of **Libya**. Weather forecasts indicate that precipitation amounts are likely to continue at below-average levels in the main cereal producing coastal areas in December, but the forecast for January points to likely heavier rainfall. If favourable weather conditions prevail for the rest of the season, the output from the cereal crops planted in January could still be substantial. In **Libya**, where cereal production is already limited by the country's geographical conditions, the ongoing conflict has affected availability and prices of agricultural inputs, curtailing production capacities. In **Egypt**, where cereal production is irrigated, sowing has started on time in November.

Below-average cereal production in 2020 increases import requirements

The subregion's aggregate cereal production in 2020 is estimated at 34.8 million tonnes, including 16.5 million tonnes of wheat and 3 million tonnes of barley. Total cereal production is 9.1 percent below the average output of the previous year. The 2019/20

agricultural season was characterized by unfavourable rainfall, both in terms of amounts and temporal distribution, which curbed production in the western part of the subregion where winter cereals are grown mostly in rainfed systems. The largest production decline was recorded in **Morocco**, which experienced drought conditions for most of the season and where total cereal production is estimated at 3.4 million tonnes, almost 40 percent lower than the weather-stricken 2019 harvest and almost 60 percent below the five-year average. Production decreases compared to the previous year were also reported in **Algeria** and **Tunisia**, while in **Egypt**, the 2020 cereal production is estimated at an average level of 24.1 million tonnes.

Reflecting the below-average 2020 output, the subregion's aggregate cereal import requirement in the 2020/21 marketing year (July/June) is estimated at 55.7 million tonnes (wheat accounts for 60 percent of this quantity), 5 percent above the imported quantity of the previous year and 12 percent above the five-year average. This volume is, however, likely to increase as many countries may decide to procure greater quantities from the international market to boost domestic stocks and improve their preparedness in case of another wave of COVID-19 infections.

Food price inflation remained at modest levels

Economic conditions in all countries in the subregion remain impacted by the global economic slowdown related to the COVID-19 pandemic and the public health measures introduced to contain the spread of the virus. While income from tourism significantly declined in **Morocco**, **Tunisia** and **Egypt**, low global oil prices impacted public finances in **Algeria** and **Libya**. Across the subregion, the decrease in employment opportunities is likely to affect

households' purchasing power, especially for informal sector workers in urban areas.

In the wake of the pandemic, despite some localized bottlenecks, most food supply chains generally demonstrated their robustness. After spikes in food prices in March and April 2020 due to increased demand driven by the effects of COVID-19 lockdown measures, prices levelled off by mid-2020 as stockpiling by consumers subsided. In most countries of the subregion, the impact of changes in international prices on domestic markets has been mitigated by governmental subsidies.

In **Morocco**, food inflation has been contained, ranging from -3 percent to 4 percent. In September 2020, the annual food price inflation increased to 2.9 percent, up from 1.4 percent one month before. Similarly, in **Algeria** in September 2020, food prices declined by 1.7 percent year on year, down from 3.9 percent recorded in August 2020. In **Tunisia**, the annual food inflation rate decreased from 3.9 percent in August 2020 to 3.3 percent in September 2020. In October 2020, the annual food inflation rate in **Egypt** was estimated at -0.7 percent, mostly on account of decreasing prices of fresh vegetables; in the past 12 months, the food price inflation has generally been negative. Similarly, food price inflation in **Libya** has been negative since late 2019 and was estimated at -3 percent in April 2020 (the most recent inflation information available) when access to foreign currency eased. However, in September 2020, the cost of the Minimum Expenditure Basket (MEB) increased, on average, by over 20 percent compared to the pre-pandemic levels. Most Libyans are employed in the public sector and experienced delays in payments of salaries, 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	16.5	13.1	12.8	11.6	6.5	6.8	6.6	38.8	38.2	34.8	-9.1
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	6.5	24.3	24.1	24.1	-0.2
Morocco	5.9	4.1	2.6	2.2	1.2	0.7	0.1	0.1	0.1	8.2	5.4	3.4	-37.9
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



Persistent conflict and extreme weather curtailed 2020 crop prospects

The 2020 aggregate cereal output in the subregion is estimated at about 71 million tonnes, below the high output of 2019 but about 4 percent above the previous five-year average. Although, the aggregate paddy rice output, estimated at 21.3 million tonnes, remained almost unchanged compared to the previous year, maize production declined in the main producing countries.

In the Sahel, harvesting of the main 2020 season cereal crops was completed in November. Relatively favourable weather conditions prevailed throughout the season, although there were localized exceptions caused by drought or floods. Persistent conflict also continued to impact agricultural activities in the northeast **Burkina Faso**, Lac region in **Chad**, northcentral **Mali**, western and eastern parts in **Niger** and northeast **Nigeria**.

Although some parts of **Gambia** and **Senegal** were affected by localized drought conditions, total cereal production in both countries increased compared to the previous year, reaching average to

above-average levels. In **Chad** and **Niger**, on account of adverse weather conditions, including long dry spells in the former country and floods in both countries, cereal harvests were near average in 2020. In addition, in **Niger**, production was constrained by a variety of pests that were reported in several districts, including Fall Armyworm (FAW), desert locusts and stemborers. In **Mali**, despite localized outbreaks of FAW and desert locusts, the 2020 cereal production is estimated to be above-average due to favorable rainfall and government support for agricultural inputs.

In bi-modal rainfall areas of **Benin**, **Côte d'Ivoire**, **Ghana**, **Nigeria** and **Togo**, harvesting of the 2020 second season maize crops started in November. The ongoing October-December rainy season has been characterized by abundant rainfall amounts which had an overall positive impact on crop establishment and development. However, at the same time, heavy rains in September and October triggered widespread floods that damaged crops and resulted in the loss of agricultural infrastructure and equipment, curbing production prospects in the worst affected areas. In addition, several areas were affected by localized FAW outbreaks.

Furthermore, the restrictive measures implemented by governments to contain the COVID-19 pandemic continued to limit access to inputs and labour and may have curtailed cereal production in some areas. For example, in **Nigeria**, field reports indicate that these measures affected seed processing and delivery in Kano state, where the bulk of the national seed supply is produced, causing a significant reduction in seed availability in several markets across the country.

In most pastoral and agro-pastoral areas of the subregion, the abundant rainfall replenished livestock water-points to satisfactory levels and benefited growing conditions of pastures. The availability and accessibility of pasture and water improved animal body conditions and enhanced their market value. However, persistent insecurity in some areas of **Burkina Faso**, **Mali**, **Niger**, **Nigeria** and **Chad** continues to hamper access to pasture. At the same time, the clustering of animals in safe areas is resulting in rapid degradation of available fodder and water resources, as well as increasing tensions between herders and farmers, affecting livelihoods of local households.

Food prices declined seasonally with the harvest

Following seasonal trends, prices of coarse grains remained stable or decreased in between September and October in several countries across the subregion as new supplies from the ongoing harvests improved domestic availabilities. However, prices remained generally above their year-earlier levels due to the effects of COVID-19-related lockdown measures, persisting insecurity in conflict-affected areas of the Lake Chad Basin, Tibesti and Liptako-Gourma regions, as well as the high inflation rates and weak currencies.

In **Burkina Faso**, **Mali**, **Niger** and **Senegal** prices of coarse grains seasonally declined in most markets or remained relatively stable in September and October, after a significant increases during the peak of the lean season in August, reflecting the start of the new harvest. However, prices

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	49.7	20.2	21.4	21.3	68.3	73.9	71.1	-3.7
Burkina Faso	4.3	4.7	4.0	0.4	0.4	0.4	4.6	5.0	4.4	-13.5
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	0.7	0.9	1.0	3.3	4.2	3.6	-14.5
Mali	6.5	7.1	7.0	2.8	3.2	3.3	9.3	10.3	10.3	0.3
Niger	5.7	5.5	5.8	0.1	0.1	0.1	5.8	5.7	5.9	3.7
Nigeria	19.2	21.4	20.1	8.1	8.4	8.2	27.3	29.9	28.3	-5.2

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).

remained generally above their values of October 2019, due partly to the effects of COVID-19 measures which resulted in localized bottlenecks along the supply chain. Further support was provided by the impact of localized production shortfalls, reflecting low yields and floods, and civil insecurity that continued to disrupt market functions. By contrast, in **Chad**, the upward trend of the previous months continued in September and prices were well above their year-earlier levels underpinned by persistent insecurity, flooding and high transportation costs due to the COVID-19 movement restrictions.

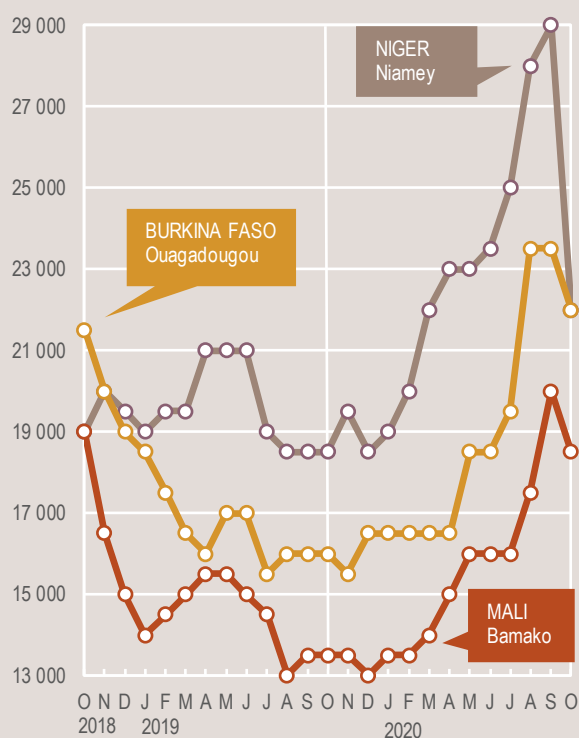
In coastal countries along the Gulf of Guinea, prices of maize in **Ghana** continued to decrease in October as markets were well supplied following the start of the 2020 main season harvest in August and by sustained import flows. In **Benin** and **Togo**, prices of maize decreased slightly in October after the rise recorded in the August-September period as expectations of a good 2020 crop weighed on prices.

In **Nigeria**, after a sharp increase since early 2020, prices of coarse grains began to decline in several markets in September with improved availabilities following the beginning of the 2020 harvest. Prices remained generally well above their values of September 2019, despite overall favourable prospects for the 2020 harvest, mainly due to the effects of restrictive measures implemented to contain the COVID-19 pandemic, high transport costs and the significant weakness of the local currency. In the conflict-affected areas of the northeast, prices of coarse grains were reported at significantly high levels, well above the prices in the rest of the country.

Food insecurity continued to worsen due to persisting conflicts and reduced livelihood opportunities

The number of food insecure people between October and December 2020, the post-harvest period, is estimated at 16.7 million, 77 percent above the figure in the corresponding period in 2019 and the highest number on record.

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



Source : Afrique Verte.

Despite the expected good 2020 harvests, civil insecurity, the health emergency caused by COVID-19, weather extremes and pest attacks, continued to result in pockets of severe food insecurity in several countries. Although some measures introduced to contain the spread of COVID-19 have been recently lifted, the economic slowdown related to the containment measures has constrained income sources and livelihood options of rural and urban populations, severely limiting their purchasing power and access to adequate quantities of food. The largest food insecure populations are located the conflict zones

in **Burkina Faso**, **Mali**, **Niger**, the **Lake Chad Basin** and northeast **Nigeria**.

Food insecurity has reached alarming levels in **Burkina Faso**, where the estimated number of people in need of external food assistance in the October-December 2020 period increased to 2 million compared to 1.2 million people food insecure one year earlier, mainly driven by the escalating conflict in the Centre-Nord and Sahel regions. The 2020 harvest is expected to be insufficient to cover household needs in the provinces of Soum, Sanmatenga, Séno, Loroum, Oudalan, Bam and Namentenga, and the food situation is likely to deteriorate further. The October 2020 edition of the FAO-WFP early warning analysis of acute food insecurity hotspots warned of rising levels of acute hunger with potential risk of famine due to persistent conflict, poor access to humanitarian assistance, flooding and the impact of COVID-19 containment measures.

In **Mali**, the volatile security situation in the northern and central regions continued to disrupt the movement of people and goods and the regular functioning of markets, in addition to limiting access to fields and reducing the capacity of households to meet their basic needs. Heavy rains in August and September resulted in localized flooding in Bamako district and in Menaka, Segou, Bamako, Timbuktu and Gao regions, affecting about 90 000 people. According to the last "Cadre Harmonisé" analysis released in December, 437 000 people were estimated to be severely food insecure in October 2020.

In **Niger**, the increase in security incidents continued to cause large population displacements in Diffa, Tillabery and Tahoua regions, diminishing livelihood opportunities of households and their food security. Moreover, flooding in August and September affected 500 000 people, mainly concentrated in the Niamey district and in areas bordering the Niger valley. Floods also caused the loss of crops from about 28 000 hectares and the death of 18 700 ruminants. The latest "Cadre Harmonisé" analysis indicated

that about 1.2 million people are food insecure, including 61 150 people in severe food insecurity (CH Phase 4). The number is expected to increase to 1.7 million people at the peak of the next lean season (June-August 2021), if no mitigation actions are taken.

In **Nigeria**, the food security situation reached alarming levels in 2020 due to the cumulative impact of the long-term conflict in the northeastern states of Borno, Adamawa and Yobe, the generally poor macroeconomic situation amplified by the effects of the COVID-19 pandemic, and armed banditry and kidnapping in the northwest (Zamfara, Katsina and Kaduna states). The October 2020 edition of the FAO-WFP early warning analysis of acute food insecurity hotspots highlighted some concerns of potential risk of famine in northeast due to heightening levels on insecurity that heavily constrain access for humanitarian assistance. In addition, heavy rainfall in the August and September 2020 period have led to large-scale flooding, affecting over 60 000 households in several localities and destroying crops from about 500 000 hectares. According to the October 2020 "Cadre Harmonisé" analysis, about 9.8 million people are estimated to be in need of external food assistance from October to December 2020, a significant increase from the estimated 4 million people in the same months in 2019. The situation is expected to deteriorate at the peak of the next lean season, between June and August 2021, when close to 14 million people are expected to require assistance if no mitigation actions are taken.

CENTRAL AFRICA



Average cereal production in 2020 due to conflicts, floods and restrictive measures related to COVID-19

In the uni-modal rainfall northern areas of **Cameroon** and **the Central African Republic**, harvesting of the 2020 millet and sorghum crops was completed in November. The outputs are estimated at below-average levels, mostly due to persisting conflicts, which continue to affect livelihoods and agricultural activities, and heavy rainfall since August 2020 that resulted in flooding in October and damaged standing crops. In central and southern areas of both countries, the 2020 secondary season maize crops, planted in October, will be harvested in January 2021 and, based on recent remote sensing imagery, crop conditions are overall favourable. However, in Cameroon's Northwest and Southwest regions, a reduced crop production is expected for the fourth consecutive year due to insecurity and displacements that have continued to affect agricultural activities and limit farmers' access to fields. In **the Democratic Republic of the Congo**, harvesting of the 2020 main maize crop was finalized in November in northern provinces and production is estimated at a near-average level following overall beneficial

weather conditions during the season. In central provinces, harvesting of the 2020 main maize crop is ongoing and is expected to finalize in January next year. In these areas, precipitation amounts were mostly adequate and well distributed during the season, which is foreseen to result in a good harvest. In eastern provinces, heavy rainfall triggered flooding in October 2020, disrupting agricultural activities. In addition, an escalation of violence since June 2020 triggered further population displacements that have hampered agricultural operations and led to localized shortfalls in cereal production. Harvesting of the 2020 main maize crop, planted in September, will start in mid-December in **the Republic of the Congo** and **Gabon**. According to satellite imagery, vegetation conditions are favourable in most cropped areas. However, excessive amounts of precipitation in northern areas of the Republic of the Congo resulted in flooding in early November and reportedly caused serious crop losses, reducing agricultural production prospects in the affected areas.

Overall, the 2020 subregional cereal output is forecast at an average level, mainly due to the impacts of persisting conflicts, displacements and floods. In addition, the effects of the restrictive measures related to the COVID-19 pandemic impeded farmers' access to crop growing areas and agricultural inputs, which were further factors contributing to the reduced production outlook.

Prices of most staple foods decreased following pandemic-induced spikes

Prices of staple foods remained stable or declined between August and

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	-9.9
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).

September 2020, but were generally higher on a yearly basis. In **the Central African Republic**, staple food prices were stable or declined in September and October, following steep increases between April and August amid the imposition of COVID-19 lockdown measures. On a yearly basis, prices of maize and cassava, foods that are produced locally, were at comparable levels. By contrast, sorghum prices were about 50 percent above the year-earlier levels due to low market supplies on account of the reduced 2020 harvest. Prices of imported products, such as rice and beans, also remained well above their levels as of October 2020. In **Cameroon**, prices of maize were higher than the year-earlier levels in most cities, mainly due to strong consumer demand. Prices of sorghum in the Far North Region declined between August and October 2020, but remained well above the levels a year earlier due to a reduced domestic output in 2020. In **the Democratic Republic of the Congo**, prices of imported foods were higher on a yearly basis as of November. Restrictive measures related to the COVID-19 pandemic impeded or reduced imports and disrupted informal cross-border trade with neighbouring countries, resulting in low market supplies and high prices.

About 28.6 million people estimated to be severely food insecure in the last quarter of 2020

In the fourth quarter of 2020, the aggregate number of severely food insecure people in the subregion is estimated at about 28.6 million (including **the Democratic Republic of the Congo**, **the Central African Republic** and

Cameroon), a 50 percent year-on-year increase. Conflicts continued to cause population displacements, resulting in the widespread disruption of agricultural and marketing activities, and consequently severely diminishing households' food availability and access. In addition, the restrictive measures put in place by governments in response to the COVID-19 pandemic negatively affected economic activities, leading to income loss that, coupled with the high level of prices, reduced households' purchasing power.

In **the Democratic Republic of the Congo**, according to the latest IPC analysis carried out in July 2020, 21.8 million people were projected to be severely food insecure in the last quarter of 2020. Conflicts have continued to significantly disrupt livelihoods especially in Ituri, North Kivu, South Kivu, Tanganyika and Maniema provinces. In addition, the COVID-19 pandemic had a severe impact on the economy, particularly on the informal sector which employs more than 70 percent of the working population. The loss of income for informal workers, inadequate social protection measures and the high level of prices have drastically reduced households' access to food. In **the Central African Republic**, the number of severely food insecure people is estimated at 1.9 million in the period between September 2020 and April 2021, based on the latest IPC analysis issued in October 2020. It represents a 20 percent increase compared to the same period in 2019/20. The deterioration of food insecurity mainly results from the high level of food prices and persisting inter-community conflicts that continued

to cause new population displacements. In **Cameroon**, according to an analysis conducted by FAO, WFP and the Ministry of Agriculture and Rural Development, about 4.9 million people were estimated to be in severe acute food insecurity in the second semester of 2020, well above the previous year's level as a result of the socio-economic impact of the COVID-19 pandemic. Of these, about 1.5 million food insecure people are located in the Northwest and Southwest Anglophone regions, where fighting is still ongoing between anti-government and pro-independence armed groups. The security situation also remains precarious in the Far North Region, where incursions of Boko Haram had increased by 60 percent in the first eleven months of 2020 compared to the same period a year before and resulted in further population displacements. According to the International Organization on Migration (IOM), about 322 000 people were estimated to be internally displaced in the Far North Region in October 2020, almost 20 percent more than a year earlier. The Government of **the Republic of the Congo**, on 3 November 2020, declared a state of humanitarian emergency after torrential rains in the northern departments of Likouala, Sangha, Cuvette and Plateaux triggered flooding, resulting in population displacements and serious crop and livestock losses. In addition, according to a study by WFP and the Ministry of Social Affairs and Humanitarian Action, in Brazzaville, as of July 2020, about 700 000 people (35 percent of the city's population) were estimated to be food insecure as a consequence of the socio-economic impact of the COVID-19 pandemic.

EAST AFRICA



Above-average 2020 cereal production despite substantial flood-induced losses

Harvesting of the 2020 main season cereal crops is well underway in central and northern parts of the subregion. The June-September rainy season was characterized by exceptionally abundant rainfall amounts, which boosted yields but also triggered widespread floods that caused substantial crop losses. In **Ethiopia**, the heavy “Kiremt” rainfall led to the overflow of rivers and dams, flash floods, landslides and waterlogging in Afar, Gambella, SNNP, Oromia and Amhara regions. Desert locusts attacked “Meher” crops at maturing stage in Afar, border areas of Tigray and Amhara regions, and in northern Somali Region, resulting in significant crop damage. Heightened insecurity has also disrupted agricultural activities in parts of Somali, Oromia, Amhara SNNP, Benishangul Gumuz and Tigray regions. In **the Sudan**, torrential rains and the overflow of rivers resulted in the worst flooding event of the last 30 years, which has affected nearly all states and caused substantial crop losses, particularly in Gadarif, Sennar and Blue Nile and Kassala states. However, the

area planted with sorghum has increased in some flood-affected areas, as it was planted instead of replanting sesame crops and, therefore, production from the replanted crop is expected to partly offset the flood-induced losses. An ongoing nationwide government-led crop assessment, supported by FAO, will provide detailed production estimates in early 2021. Substantial crop losses due to floods are also expected in **South Sudan**, especially along the White Nile River in Jonglei, Lakes and Unity states. In addition, persisting insecurity in Jonglei, Warrap and Lakes states continued to disrupt agricultural activities and national 2020 crop production estimates will be provided by a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) at the beginning of 2021. In **Eritrea**, following a period of reduced precipitation at the start of the 2020 “Kiremt” rainy season (June-September), abundant rains from August offset the early seasonal soil moisture deficits and lifted production prospects, especially in key producing Gash Barka Region. In the key growing areas of the Rift Valley and Western provinces of **Kenya**, 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 southern parts of the subregion, harvesting of the 2020 second season cereal crops has recently started in central and southern bi-modal rainfall areas of **Uganda** and southern **South Sudan**, while in northeastern **United Republic of Tanzania** (“Vuli”), **Somalia** (“Deyr”) and marginal and coastal agricultural areas of southeastern **Kenya** (“short-rains”),

crops will be harvested in early 2021. Rainfall amounts have been abundant between October and mid-November over **Uganda**, southern **South Sudan**, and **the United Republic of Tanzania**, favouring crop development. By contrast, in coastal and marginal agricultural areas of southeastern **Kenya**, scattered and below-average rainfall amounts were received and, therefore, a below-average harvest is expected. In key cropping areas of southern **Somalia**, rains have been characterized by an erratic temporal distribution, with a prolonged dry spell in October that had a negative impact on crop establishment and vegetation conditions. Subsequently, torrential rains in the first half of November benefited crop conditions, but also resulted in substantial crop losses due to floods, particularly in maize producing areas along the Juba and Shabelle rivers and in the “sorghum belt” of Baidoa region. In addition, the desert locust infestation, which had been previously confined to northern and central pastoral regions, has recently expanded into southern key cropping areas and significant damages to sorghum and cowpea crops are reported in Hiraan, Middle Shabelle, Galgaduud and Mudug regions. As a result, a below-average cereal production is expected.

In **Rwanda** and **Burundi**, harvesting of the “2021A” season crops is expected to be delayed by two to three weeks, but is anticipated to start in January. The September-November rainy season in both countries has been characterized by a delayed onset and an erratic spatial and temporal distribution of precipitation, which delayed planting operations and adversely impacted germination of early planted crops. In **Rwanda**, improved rains

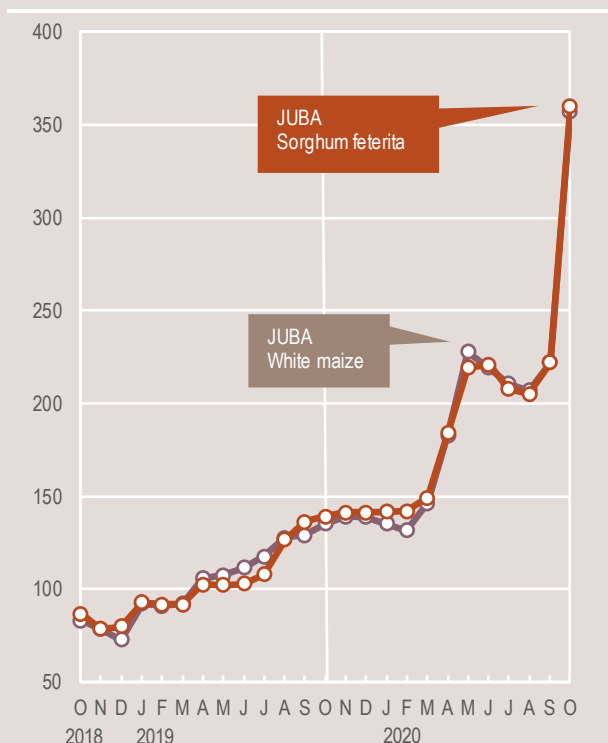
Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2019 estim	2020 fcast	5-yr Avg.	2019 estim	2020 fcast	5-yr Avg.	2019 estim	2020 fcast	Change: 2020/2019 (%)
East Africa	5.8	6.4	6.1	44.3	45.2	46.0	53.9	55.4	56.4	1.8
Ethiopia	4.8	5.3	5.1	22.1	24.2	23.1	27.0	29.7	28.3	-4.6
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).

Retail prices of maize and sorghum in South Sudan
(South Sudanese Pound/kg)

Source: Crop & Livestock Market Information System (CLIMIS).

since late October improved vegetation conditions and lifted crop prospects, which are generally favourable. By contrast, in **Burundi**, prospects remain uncertain as rains continued to be erratic.

FAO's preliminary estimate of the subregion's 2020 aggregate cereal output, including a forecast for the second season harvests, stands at a slightly above-average level of 56.4 million tonnes.

In pastoral areas of northern and eastern **Kenya**, southeastern **Ethiopia** and central and northern **Somalia**, the performance of the October-December rains has been mixed. In northwestern **Kenya**, **Ethiopia's** Borena zone in Oromiya Region and areas of southern Somali Region, and in central **Somalia**, seasonal rains were adequate. By contrast, in most of the Somali Region, eastern **Kenya** and in northern **Somalia** dry conditions prevailed and vegetation conditions in grassland areas are below average. In addition, in several pastoral areas of **Somalia**, significant pasture losses due to desert locusts have been reported, while insect numbers are increasing in the Somali Region of **Ethiopia** and in northeastern **Kenya**. Livestock body conditions are currently still average to above average after the beneficial impact of recent consecutive favourable rainy

seasons. However, in areas affected by dryness and locust-induced pasture losses, a faster-than-usual deterioration of animal conditions are expected during the forthcoming January-March dry season.

Cereal prices continued to rise steeply in the Sudan and South Sudan

In the **Sudan**, prices of sorghum and millet continued to increase steeply and rose by up to 30 percent between August and October, when they reached new record highs. The high prices are mainly due to a reduced 2019 cereal output and currency weakness. In **South Sudan**, prices of maize and sorghum, already at high levels, rose sharply in October in the capital, Juba, by more than 60 percent, as

the local currency depreciated abruptly in the parallel market in mid-October. Factors that have contributed to the exceptionally high prices are the difficult macro-economic situation, the domestic supply shortfalls, the lingering impact of the prolonged conflict and, more recently, the COVID-19 screening measures at border points in Uganda, the country's main source of imported cereals, which slowed down trade flows. In **Uganda**, prices of maize in October were about 30-35 percent below their year-earlier levels, mainly due to COVID-19-related restrictions which depressed demand for maize from the hospitality sector, schools and urban households. In **Burundi**, prices of maize increased by 20-30 percent between August and October following seasonal patterns but remained around their year-earlier levels on account of adequate domestic availabilities following consecutive above-average

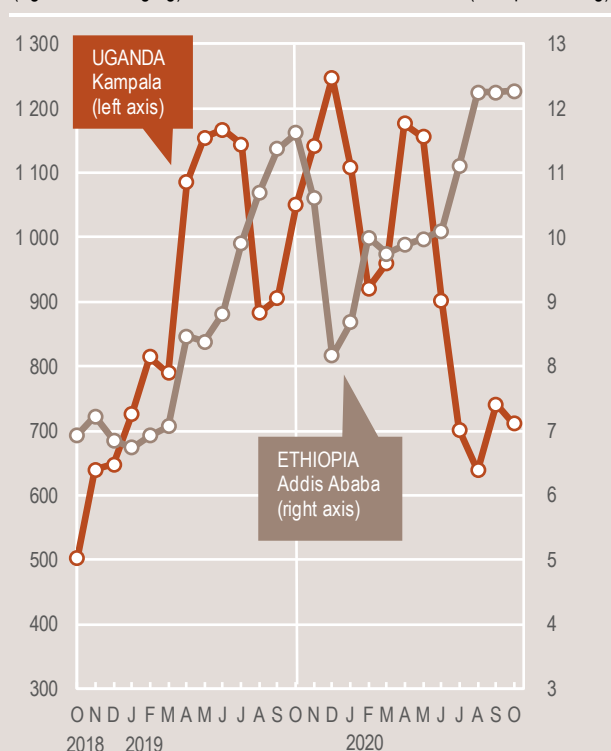
harvests. In **Ethiopia**, prices of maize levelled off or began to decline in October with the recent start of the major "Meher" harvest. Prices in October were up to 30 percent above their year-earlier levels, mainly due to the continuous depreciation of the country's currency, which has resulted in increased transportation and production costs. In **Kenya**, prices of maize declined or were stable in western key-producing areas, with the start of the "long-rains" harvest, and in the capital, Nairobi. Overall, prices in October were 5-25 percent lower on a yearly basis. In **Somalia**, prices of sorghum and maize declined in September by 5-25 percent in key southern producing areas with the commercialization of the "Gu" off-season harvest and were 10-30 percent lower than the high levels of one year earlier.

Alarming food security situation due the COVID-19 pandemic, widespread floods and desert locusts

The aggregate number of people in need of humanitarian assistance in the subregion is estimated at 28 million, and are mainly located in **Ethiopia**, **South Sudan** and **the Sudan**. This number is similar to the high levels of food insecurity recorded during the severe and prolonged drought in

Maize prices in selected East African markets

(Ugandan Shilling/kg) (Ethiopian Birr/kg)



Sources: Regional Agricultural Trade Intelligence Network, Uganda; Ethiopian Grain Trade Enterprise, Ethiopia.

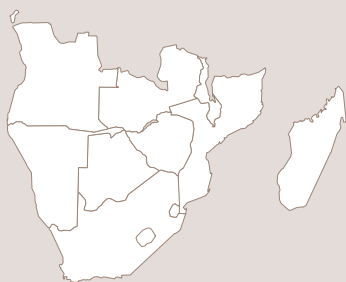
2016 and 2017. The current food security situation is affected by the combined impact of the COVID-19 pandemic, widespread floods and desert locust outbreaks. The restrictive measures implemented to contain the COVID-19 virus have hindered livelihood activities, impaired domestic and cross-border trade of food commodities, resulting in reduced market availabilities and higher food prices. In addition, they diminished labour opportunities and consequently reduced incomes, especially in urban areas, constraining households' purchasing power. The global economic slowdown has caused a sharp decline in remittances, while reduced sales and exports of livestock have affected the incomes of pastoralist households. Despite the recent phasing out of some restrictive measures, the economic recovery is slow. Since June, torrential rains have triggered floods across the subregion, which caused displacement, damage to farmland and livestock deaths and affected about 3.6 million people mainly in Ethiopia, the Sudan, South Sudan and Somalia. In addition, significant crop and pasture losses due to locusts were reported in Ethiopia and Somalia.

In **South Sudan**, about 6.5 million people (55 percent of the total population) were projected to face Phase 3: "Crisis" or higher levels of acute food insecurity during the May-July 2020 period. However, this projection was conducted in early 2020 and, therefore, had not factored in the

effects of the COVID-19 pandemic, the upsurge of inter-communal violence and the recent floods. As a result, the current severity and prevalence of food insecurity is likely to be substantially higher. Particular concern exists for about 500 000 people in Jonglei State who were already expected to face severe food insecurity conditions before the floods and are at risk of famine if food assistance is not urgently scaled up beyond the planned levels. In **Ethiopia**, about 6.7 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between October and December 2020. About 80 percent of the food insecure people are located in SNNP, Eastern Oromia and Somali regions, due to a poor "Belg" harvest, crop and pasture losses due to locusts, the negative impact of the COVID-19 pandemic and floods, against a backdrop of reduced household resilience following recurrent climatic shocks. In **Somalia**, about 2.1 million people are estimated to be severely food insecure (IPC phases 3 and 4) between October and December 2020. This figure is almost 17 percent of the total population and is more than 80 percent above the estimate of the food insecure people at the beginning of 2020. The situation is worsening due to multiple shocks, including the desert locust outbreak, widespread floods and the COVID-19 pandemic. In **the Sudan**, 7.1 million people are estimated to be

severely food insecure (IPC phases 3 and 4) between October and December 2020. This figure is more than 20 percent higher on a yearly basis and accounts for about 15 percent of the total population. The current alarming food insecurity conditions are caused by widespread floods, soaring food prices, the impacts of the COVID-19 pandemic and political instability and social unrest, mainly in eastern areas. In **Uganda**, according to the latest IPC analysis, conducted in urban areas, refugee settlements, host communities and in Karamoja Region, about 2 million people are estimated to be severely food insecure (IPC phases 3 and 4) in the period September 2020-January 2021. In the traditionally food secure urban areas, more than 600 000 people are currently food insecure due to the COVID-19-related restrictive measures as poor households, which mainly rely on daily wages from casual labour, experienced a sharp decline in income, coupled with increasing food prices. In **Kenya**, the number of food insecure people declined in rural areas from 3.1 million in late 2019 to about 850 600 between October and December 2020 due to favourable rains during the last two consecutive seasons that boosted crop and livestock production. By contrast, the food security situation significantly deteriorated in urban areas, where about 1 million people are currently estimated to be food insecure due to the impact of the pandemic on the livelihoods of vulnerable households.

SOUTHERN AFRICA



Weather outlook points to promising yields for 2021 cereal crops

Planting of the 2021 cereal crops, to be harvested next year, is well underway and is anticipated to conclude in January. Cumulative rainfall amounts in October and November 2020 were near average across most central and southern areas, creating favourable conditions for crop germination. In western areas, namely southern **Angola** and **Namibia**, as well as in northern **Mozambique** and central and southern **Madagascar**, rainfall has been sparse compared to normal amounts, resulting in early seasonal soil moisture deficits that could curtail plantings. However, weather forecasts for the December 2020-February 2021 period indicate a higher-than-normal probability of above-average rainfall in most countries, predictions underpinned by the La Niña phenomenon that is currently present. Although the risk of flooding, heightened cyclone activity and associated agricultural damage increases, the forecast supports a generally favourable production outlook for the 2021 cereal crops. The rainfall outlook differs for **Malawi** and parts of **Angola** and **Namibia**, where forecasts

indicate a higher-than-normal likelihood of below-average rainfall amounts.

Although official estimates on planting intentions are not available for most countries, the subregional 2021 cereal acreage is foreseen at an average to above-average level. The optimistic outlook is based on the favourable weather forecasts and, mainly pertaining to the commercial sector, remunerative grain prices. In addition, with many of the COVID-19-associated movement restrictions lifted in recent months, physical access to agricultural input markets and fields has improved.

However, there are some concerns for the 2021 cereal production due to the adverse effects of the COVID-19 pandemic on farmers' income that are likely to limit their ability to purchase agricultural inputs. In response, governments in several countries have proposed to expand their agricultural support programmes, specifically to ameliorate farmers' access to fertilizers. Nonetheless, the effects of the pandemic on governments' resources, both through a reduction in public revenues and an increase in health expenditures, are likely to constrain financial support to the agriculture sector. A further risk to the 2021 cereal production are the outbreaks of African migratory locusts and red locust hoppers, which were first reported in February 2020 in **Namibia**, but have since spread and are now present in **Angola**, **Botswana**, **Zambia** and **Zimbabwe**. National governments, with support from FAO, are monitoring the situation and implementing containment and mitigation measures.

Cereal production recovered in 2020

Production of staple cereals in 2020 is estimated at an above-average level of 37.6 million tonnes. This outturn is a significant rebound compared to the weather-affected harvest in 2019 and reflects abundant rainfall in the second half of the season that resulted in an upturn in yields and an increase in the area harvested. The bulk of the subregional production increase resulted from large outputs in **South Africa**, the main producer in the subregion, **Malawi** and **Zambia**. By contrast, cereal production in **Zimbabwe** is estimated at 1.25 million tonnes, approximately 12.5 percent below the five-year average due to significant seasonal rainfall deficits.

Import needs fall on the back of large harvests

Most countries' import needs have fallen on account of the large outputs harvested in 2020 and their demand is likely to be covered by the ample export supplies in **South Africa** and **Zambia**. In total, the subregional cereal import requirement is estimated at a below-average level of 9.3 million tonnes in the 2020/21 marketing year (generally April/March). Most of this quantity is wheat, which is produced in limited quantities in the subregion, and the remaining amount is comprised of rice (milled) and maize, the key food staple.

The aggregate import requirement for maize is estimated at 2 million tonnes in 2020/21, 22 percent below the five-year average and below the previous year's level. Although import requirements in **Zimbabwe** account for the largest share

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	2.4	25.1	23.9	30.6	4.1	4.5	4.6	31.3	30.1	37.6	24.9
excl. South Africa	0.3	0.2	0.4	12.4	11.5	14.0	4.1	4.5	4.6	16.8	16.2	19.0	17.1
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.6	3.9	3.9	3.8	4.1	4.1	-0.6
Malawi	0.0	0.0	0.0	3.1	3.6	4.0	0.1	0.1	0.1	3.2	3.7	4.1	10.8
Mozambique	0.0	0.0	0.0	2.2	2.5	2.5	0.4	0.3	0.5	2.6	2.8	3.0	4.4
South Africa	1.7	1.5	2.0	12.8	12.3	16.6	0.0	0.0	0.0	14.4	13.9	18.6	34.0
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	0.2	1.3	0.9	1.1	0.0	0.0	0.0	1.4	0.9	1.3	32.6

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

in the subregion, the weak currency and low levels of foreign exchange reserves of the country raise concerns about the capacity to purchase sufficient supplies from the international market. Several other importing countries in the subregion have also experienced currency depreciations, partly driven by the effects of the pandemic and, whilst availability of grain supplies remains satisfactory, the rising import costs present access challenges.

Exports of maize from within the subregion are forecast to increase in 2020/21 to an above-average level of 2.8 million tonnes. The foreseen rise is mainly driven by buoyant export prospects in **South Africa**, where the large output has bolstered exportable surpluses and the depreciation of the currency has increased the competitiveness of South African grain on the international market. Exports from **Zambia** are also seen to increase but are likely to remain lower than the average as the country seeks to build up the national stocks following drawdowns in the previous two years.

Supply pressure tempers increases in staple food prices

In most countries, nominal prices of maize remained stable or climbed moderately in recent months, underpinned by a favourable supply situation. In **Malawi** and **Zambia**, prices of maize grain increased only gradually from April, at the start of the main harvest period, to October and were generally lower on a yearly basis. The reduced prices principally reflect the above-average maize harvests in 2020. Prices of maize in **Mozambique** increased seasonally, but in contrast to the aforementioned countries were higher on a yearly basis. In import-dependent **Botswana** and **Eswatini**, prices of maize meal were mostly firm but also higher on a yearly basis as of October, while in **Namibia**, although similarly stable, prices were at comparable levels to the previous year. In contrast to these generally subdued price movements, the annual

food inflation rate in **Zimbabwe** was at exceptionally high levels in the preceding months, peaking at 866 in August, mainly due to the overall weak currency as well as the reduced agricultural harvests in 2019 and 2020. In **South Africa**, wholesale prices of maize grain increased steeply between August and October, when they were 25 percent above their year-earlier values. The increase partly resulted from rising international prices that have more than offset the dampening effects of a large domestic harvest. Robust export demand, particularly from East Asian countries, provided additional upward support.

Despite large harvests and stable prices, COVID-19 heightened food insecurity

Despite the easing of movement restrictions in recent months that have helped to stimulate economic activities, the impact of the COVID-19 pandemic has severely stressed food security conditions. The primary effect has been through the loss of incomes and jobs, as the earlier lockdown measures halted many livelihood activities and as a result, households' capacity to access food was reduced. All countries, barring **Malawi**, are expected to undergo economic recessions in 2020, according to the latest projections by the International Monetary Fund (IMF). The most significant economic decline is forecast in **Zimbabwe**, with substantial downturns also estimated in **Botswana**, **Namibia** and **South Africa**.

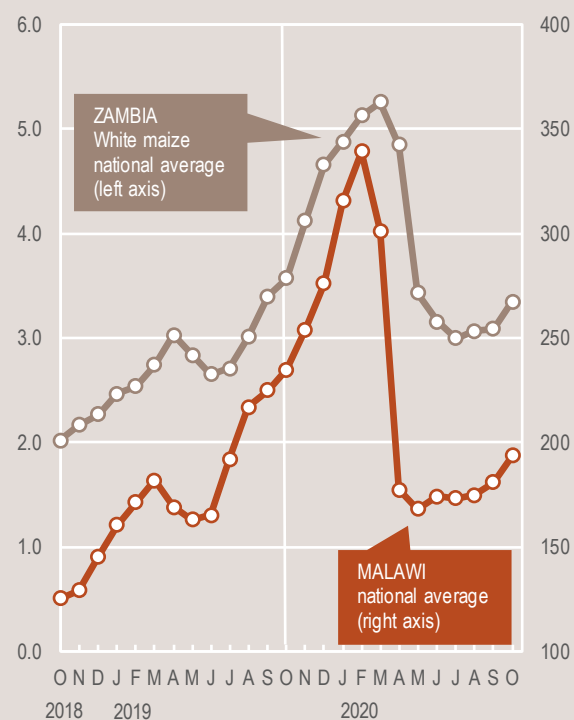
The large domestic cereal harvests in 2020, which have reinforced rural households' food supplies and are

likely to have raised incomes through increased crop sales, have counteracted some of the effects of the pandemic and prevented a more acute deterioration of the food insecurity situation. The ample cereal supplies have also tempered steeper seasonal price increases and, therefore, contributed to curbing the adverse effects of reduced incomes on rural households' purchasing power.

Based on the latest available assessments, the number of food insecure people in the subregion in 2020/21 is estimated at about 13.4 million people, 6 percent higher than the previous year. In addition to the COVID-19 pandemic, which has been the key factor driving the current conditions, the conflict in northern **Mozambique**, although localized, has severely disrupted livelihood in the affected and resulted in high levels of food insecurity.

Maize prices in selected Southern African markets

(Zambian Kwacha/kg) (Malawian Kwacha/kg)



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

REGIONAL REVIEWS

ASIA

Note: Situation as of November

■ Subregional borders
 ■ Territories/boundaries**

CIS IN ASIA

Wheat (winter season): Planting

NEAR EAST ASIA

Coarse grains (winter season):
Planting to establishment

FAR EAST ASIA

China (Mainland)
Rice (late double season): Harvesting
Wheat (winter season): Planting
Southeastern Far East Asia
Maize and rice (secondary season):
Planting
Rice (main season): Harvesting

FAR EAST ASIA

Southern Far East Asia
Coarse grains: Harvesting
Rice (main season): Harvesting
India
Coarse grains and rice (kharif season): Harvesting
Maize and wheat (rabi season): Planting

** See Terminology (page 6)

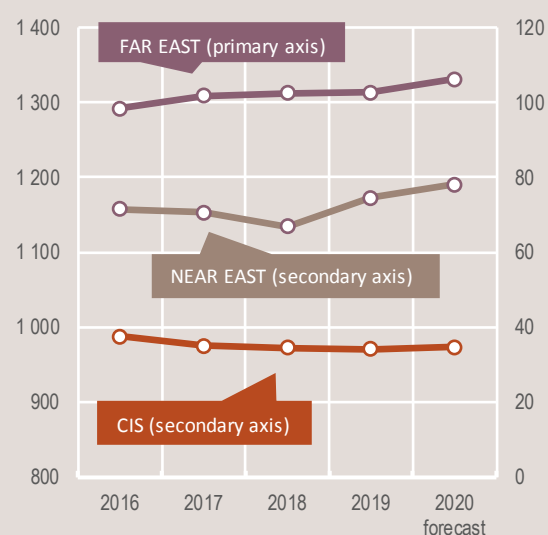
Source: GIEWS

Asia Production Overview

The aggregate 2020 cereal production is forecast at 1 444 million tonnes, a yearly increase of about 22 million tonnes, putting this year's output 2.7 percent above the five-year average. The upturn is mainly driven by increases in the Far East where, despite floods that caused crop losses, acreage expansions and overall conducive weather fostered an all-time high paddy outturn in 2020. In the Near East, conducive weather led to production increases in the main producing countries, while improved security conditions in the Syrian Arab Republic and Iraq further supported production gains estimated this year. In CIS in Asia, dry weather conditions kept aggregate cereal production at a below-average level in 2020.

Planting of the 2021 winter wheat crops started in October amid mixed weather conditions, but sowings are expected at average to above-average levels.

Cereal production (million tonnes)



FAR EAST



Favourable planting conditions for 2021 winter crops

Planting of the mostly irrigated 2021 winter wheat crop started in October and will continue until the end of the year. Near-average precipitation across the main growing areas of the subregion between September and early November, coupled with ample supplies of irrigation water ensured adequate soil moisture, which facilitated land preparation and planting activities. In **China (mainland)**, according to field assessment reports, growing conditions of the germinating 2021 winter wheat crop are favourable throughout the country and the area planted is estimated to be close to a near-average level of 22.8 million hectares. In **India**, planting operations are progressing at a fast pace, supported by ample water availabilities for irrigation and remunerative minimum support prices guaranteed by the Government. In **Pakistan**, the area

planted with wheat is officially forecast at an above-average level of 9.2 million hectares, prompted by record domestic prices and official programmes promoting wheat production. At the end of October, the Government of Pakistan increased the minimum support price for the 2021 wheat crop by 15 percent compared to the previous year and announced plans to support wheat producers with subsidies for fertilizers and pesticides. In the remaining countries of the subregion, where only small quantities of wheat are produced, planting operations are progressing under generally favourable weather conditions.

The final output of the current season will, however, depend on the precipitation performance until April/May 2021, which is being influenced by the prevailing La Niña phenomenon. Normally, La Niña weather patterns are characterized by below-average precipitations in important wheat producing areas of the Korean Peninsula, centraleastern parts of China (mainland), and central and northern parts of Pakistan. In particular, sparse snow coverage in areas normally experiencing freezing weather would increase the risk of germinating crops being exposed to freezing temperatures and reduce the availability of soil moisture that comes from melting snow during the spring months.

In the subregion's countries located in the Southern Hemisphere and along the Equator, land preparation and planting of

the 2021 main season crops, mostly rice and maize, is ongoing under generally favourable weather conditions. In these areas, the La Niña phenomenon is associated with above-normal rainfall amounts, with the potential for excessive rains raising the risk of flooding.

Above-average cereal output forecast in 2020

In most Northern Hemisphere countries, harvesting of the 2020 main crops, mostly rice and maize, is well advanced and will finalize early next year. In countries in the Southern Hemisphere and along the Equator, the 2020 main season crops were harvested earlier in the year, while harvesting of the 2020 secondary season crops is nearly complete.

The subregion's aggregate cereal production is forecast at a slightly above-average level of 1 331 million tonnes in 2020. This figure includes forecasts for the secondary season crops, to be harvested next year in Northern Hemisphere countries. The optimistic outlook reflects generally favourable weather conditions during the 2020 main season, despite floods that affected crops in various countries, including parts of **Bangladesh, China (mainland), the Democratic People's Republic, India, Nepal and Pakistan**. Production of rice, the major staple in the subregion, is forecast at an all-time high of 679 million tonnes (in paddy terms) in 2020, reflecting acreage expansions that were driven by

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 fcast	5-yr Avg.	2019 estim	2020 fcast	5-yr Avg.	2019 estim	2020 fcast	5-yr Avg.	2019 estim	2020 fcast	Change: 2020/2019 (%)
Far East	259.4	267.3	272.0	373.1	375.6	380.6	667.8	670.7	678.6	1 300.3	1 313.7	1 331.2	1.3
Bangladesh	1.2	1.0	1.3	2.9	3.6	3.8	53.2	54.8	54.8	57.4	59.4	59.9	0.9
Cambodia	0.0	0.0	0.0	0.9	0.9	1.0	10.3	10.9	11.0	11.2	11.8	11.9	1.1
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	168.5	177.6	182.2	308.6	325.2	337.1	3.7
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	2.6	2.9	3.0	26.0	25.3	25.1	28.7	28.3	28.2	-0.4
Nepal	2.0	2.2	2.2	2.8	3.0	3.1	5.2	5.6	5.5	9.9	10.8	10.8	0.0
Pakistan	25.5	25.2	25.3	6.6	7.2	7.5	10.7	11.1	12.3	42.8	43.5	45.0	3.5
Philippines	0.0	0.0	0.0	7.7	8.0	8.1	18.6	18.9	19.2	26.3	26.9	27.3	1.3
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.4	5.0	4.7	5.6	5.3	4.9	-5.8
Sri Lanka	0.0	0.0	0.0	0.2	0.3	0.4	4.0	4.6	5.1	4.3	4.8	5.5	14.0
Thailand	0.0	0.0	0.0	4.9	4.5	5.0	30.6	28.3	29.4	35.4	32.8	34.4	4.8
Viet Nam	0.0	0.0	0.0	5.1	4.8	4.6	43.7	43.4	42.4	48.8	48.2	47.1	-2.3

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

profitable prices at planting time and by the continuation of government programmes that support rice production. Yields are also forecast at above-average levels in the majority of countries reflecting improved weather conditions. In **China (mainland)**, the world's largest rice producer, the 2020 paddy harvest is estimated at 210.5 million tonnes, up slightly from the 2019 level. In **India**, paddy production from the 2020 main "Kharif" season crop is anticipated to reach a record high, owing to a year-on-year increase in plantings. Aggregate rice production in 2020 in India is forecast at a record level of 182.2 million tonnes, 8 percent above the five-year average. Similarly, large outputs are forecast in **Cambodia, Nepal, Pakistan** and **Sri Lanka**, due to both above-average plantings and yields. Near-average outputs are forecast in **Japan**.

Aggregate production of maize is forecast at about 350 million tonnes in 2020, close to the previous year's high level. Well above-average outputs are forecast in most countries of the subregion, including **Bangladesh, India, Indonesia, Myanmar, Nepal, Pakistan, the Philippines** and **Thailand**, prompted by strong demand for feed and non-food uses, such as starch and ethanol fuel. The only exception is **Viet Nam**, where the 2020 maize production is forecast below the five-year average, following a third consecutive yearly contraction in plantings, as farmers switched land to more remunerative horticulture crops.

The 2020 wheat harvest was completed in June 2020 and, based on official production

data, the subregion's aggregate output is estimated at an all-time high of 272 million tonnes. Most countries in the subregion harvested record or near-record outputs reflecting favourable weather conditions and adequate irrigation water supplies. The only exception was **Pakistan**, where excessive rainfall and hail in March and April in Punjab province and localized locust outbreaks led to a below-average output for the third consecutive year.

Wheat imports forecast at an above-average level in 2020/21

Aggregate wheat import requirements are estimated at 55.2 million tonnes, 9 percent above the five-year average. This reflects the high levels of imports from the subregion's main importers, namely **Bangladesh, Indonesia, Malaysia** and **the Philippines**. Additionally, **Pakistan**, traditionally a wheat exporting country, is forecast to import 1.7 million tonnes of wheat in the 2020/21 marketing year (April/March), the highest level since 2008/09, as the country faces tight domestic availabilities. Aggregate imports of coarse grains, mostly maize, are forecast to remain at a high level of 76.5 million tonnes in 2020/21 reflecting the strong demand by the feed industry in **China (mainland), the Republic of Korea** and **Viet Nam**, which together normally account for almost 70 percent of the subregion's coarse grain imports. Imports of rice in 2021 are projected at 11.7 million tonnes (milled terms), 7 percent above the 2020 level. Exports of rice, accounting for the bulk of the subregional cereal export quantity, are forecast to increase to nearly 40 million tonnes (in milled terms).

Prices of rice followed mixed trends, but generally remained at high levels

Domestic prices of rice followed mixed trends between August and October and were generally above their year-earlier levels in most countries. In **Thailand**, after a slight increase in August, prices decreased seasonally in September and October as the harvest began and these declines were further underpinned by muted export demand. In **Viet Nam**, after strong increases in July and August, prices showed some signs of softening in subsequent months reflecting improved supplies from the 2020 "summer-autumn" harvest. In **India**, despite the recent start of the 2020 main crop harvest, prices of rice have been broadly stable, on upward support from a strong start to the Government purchase campaign. Prices remained generally stable also in **Cambodia** and **China (mainland)**, reflecting adequate market availabilities. In Yangon, **Myanmar**, prices of rice increased sharply between August and October when they reached record levels. The steep increases were mainly underpinned by tight market supplies, amid COVID-19-related restrictions that disrupted internal trade of foods. In **the Philippines**, a rice importing country, prices were stable in August and September, and decreased in October with the 2020 main season harvest. In Dhaka, **Bangladesh**, prices of rice generally increased between August and October, when they were 35 percent above their year-earlier levels. The high prices reflect seasonal upward pressure, which was exacerbated by concerns over

Table 12. Far East cereal production and anticipated trade in 2020/21¹

(thousand tonnes)

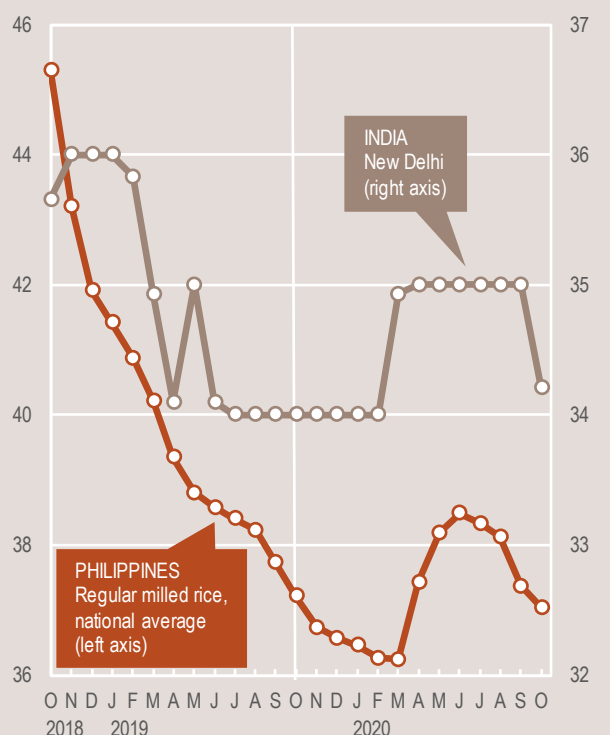
	Avg 5-yrs (2015/16 to 2019/20)	2019/20	2020/21	Change: 2020/21 over 2019/20 (%)	Change: 2020/21 over 5-yr avg (%)
Coarse grains					
Exports	3 631	3 518	3 104	-11.8	-14.5
Imports	67 087	73 771	76 476	3.7	14.0
Production	373 102	375 634	380 639	1.3	2.0
Rice (milled)					
Exports	37 284	36 214	39 768	9.8	6.7
Imports	13 371	11 011	11 714	6.4	-12.4
Production	444 180	446 668	451 870	1.2	1.7
Wheat					
Exports	2 385	1 755	1 928	9.9	-19.2
Imports	50 820	50 513	55 180	9.2	8.6
Production	259 401	267 274	271 982	1.8	4.9

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

Rice retail prices in selected Far East countries

(Philippine Peso/kg)

(Indian Rupee/kg)



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

the impact of unfavourable weather conditions on production prospects for the forthcoming 2020 “Aman” crop and increased demand amid the COVID-19 pandemic.

Prices of wheat grain and flour were generally stable or increased between August and October. The steepest price increases were registered in **Pakistan**, where wheat flour prices reached record highs in October 2020 reflecting tight market availabilities after a lower-than-expected 2020 harvest, which followed below-average outputs in 2018 and 2019. In an effort to curb further increases, the Government of Pakistan started to import wheat as well as allowing duty-free commercial imports. In **China (mainland)**, the

subregion’s main producer, prices of wheat had increased marginally since August 2020, reflecting seasonal patterns. In importing countries, prices of wheat increased slightly in **Bangladesh**, mostly mirroring seasonal trends, while they remained stable in **Sri Lanka**.

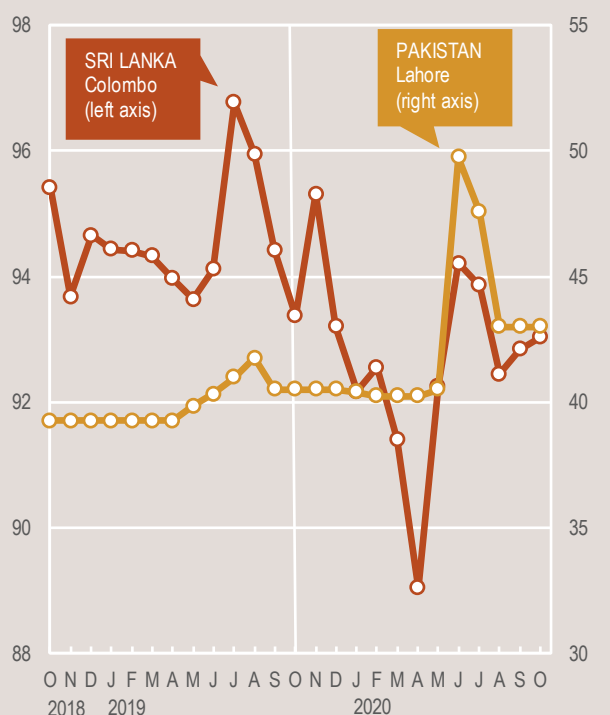
Food insecurity generally stable, but concerns remain due to COVID-19 pandemic

Pockets of severe food insecurity persist and the number of food insecure people is expected to have increased in 2020 due to the COVID-19 pandemic. In addition, the impact of floods, which caused the loss of lives, large population displacements and damages to infrastructure, also aggravated food insecurity conditions. In **Viet Nam**, severe floods in October and early November 2020 had a negative impact on the livelihoods of approximately 1.5 million people, particularly in the central parts of the country. In **Bangladesh**, Tropical Cyclone Amphan made landfall in May 2020 in southwestern parts of the country and caused widespread floods in July in northern parts, affecting about 5 million people. In

Wheat flour retail prices in selected Far East countries

(Sri Lankan Rupee/kg)

(Pakistan Rupee/kg)

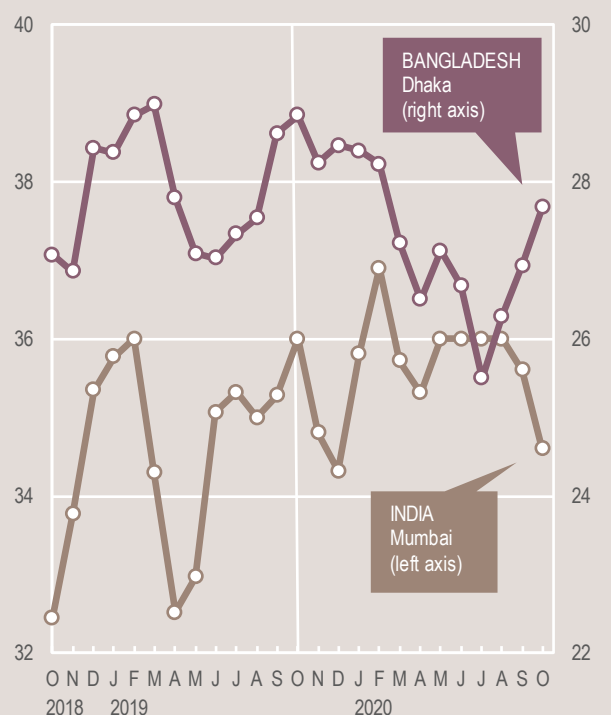


Sources : Pakistan Bureau of Statistics; Department of Census and Statistics, Sri Lanka.

Wheat flour retail prices in selected Far East countries

(Roupie indienne/kg)

(Taka/kg)



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

addition, the food security situation of large numbers of people has deteriorated due to income losses and a reduction in remittances caused by the effects of the COVID-19 pandemic. About 860 000 refugees from Myanmar are still sheltering in the Cox's Bazar District of Bangladesh and most of them rely heavily on humanitarian assistance, whose deployment has been significantly hampered by the COVID-19 movement restrictions. In **Myanmar**, as of October 2020, an estimated 235 000 internally displaced people, mostly hosted in temporary settlements in Rakhine and Kachin states, were suffering from high levels of food insecurity and require humanitarian assistance to cover their basic needs. In **Pakistan**, according an Integrated Food Security Phase Classification (IPC) analysis conducted prior to the COVID-19 pandemic, about 1.8 million people were projected to face severe food insecurity in the administratively merged areas of Khyber Pakhtunkhwa (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between June and August 2020. In addition, about 1.4 million Afghan refugees reside in Pakistan and require humanitarian assistance to cover their basic needs. In **the Democratic People's Republic of Korea**, large numbers of people have low levels of food consumption and poor dietary diversity. The economic constraints, exacerbated by the impact of the COVID-19 pandemic, have increased the vulnerability of the local population to food insecurity. In addition, a large number of people were affected by floods in August, particularly in the southern provinces of the country, which caused the loss of lives, food crops as well as damages to housing and infrastructure.

NEAR EAST



Mixed conditions for sowing of 2021 winter crops

Sowing of the 2021 winter wheat and coarse grains crops is currently underway and, depending on location and soil conditions, will continue until next January. The first substantial rainfall of the season was recorded in November and eased concerns over early season drought in the major cereal producing countries of **Turkey, Iraq, Syrian Arab Republic** and in some parts of **the Islamic Republic of Iran**. In **Afghanistan**, erratic rainfall in October and the first decade of November did not enable the adequate establishment of crops. Although favourable precipitation in the second decade of November reduced soil moisture deficits, there are increased chances of below-average precipitation during the cropping season in **Afghanistan** and parts of **the Islamic Republic of Iran**, underpinned by the prevailing La Niña conditions. Continued inadequate precipitation would adversely affect the development of the cereal crops. In addition, sparse snowfall would reduce the availability of irrigation water from melted snow.

Above-average cereal output gathered in 2020

At the subregional level, total cereal production (rice in paddy terms) is estimated at 78.1 million tonnes in 2020, 5 percent more than in the previous year and 10 percent above the five-year average. The increase was supported by production recoveries in **Turkey, Iraq** and **the Syrian Arab Republic** as a result of favourable weather conditions. In **Turkey**, cereal production is officially estimated at an above-average level of 36.6 million tonnes, 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. In **Iraq**, the total cereal output is estimated at an above-average level of at least 7.5 million tonnes, almost 10 percent over the previous year's harvest. Improved security conditions in **the Syrian Arab Republic** contributed to an upturn in 2020 cereal production that 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.

In **Afghanistan**, where structural issues, including the inadequate supply of agricultural inputs, continued to constrain production, the cereal harvest in 2020 was estimated at a slightly above-average level of 5.7 million tonnes, although about 7 percent below the 2019 bumper harvest. In **Yemen**, the conflict continued to debilitate agricultural livelihoods by limiting the availability of inputs and constraining access to fields. Locust outbreaks, albeit partially controlled, has tested the country's

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	4.7	5.2	5.4	71.0	74.5	78.1	4.8
Afghanistan	4.4	5.1	4.7	0.5	0.4	0.5	0.5	0.6	0.5	5.5	6.1	5.7	-6.8
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	36.6	6.6

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

ability to respond. In **Lebanon**, farmers continued to cope with the effects of the financial crisis that has further increased the already elevated prices of agricultural inputs.

The subregional cereal import requirement in the 2020/21 marketing year (July/June) is forecast at 75 million tonnes, approximately 2.6 million tonnes below the previous year and almost 6 percent above the five-year average. At 30.3 million tonnes, the wheat import requirement is forecast to remain similar to the five-year average and 9 percent below the previous year's level.

Persisting conflict and weak economies worsened food insecurity; threat of famine in Yemen

The pandemic-induced global economic slowdown has exerted 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 national income. Although oil prices have partially recovered since March 2020, they remained below their year-earlier levels as of November 2020. In addition, the curfews and restrictions on the movement of people to contain the virus have limited employment opportunities, especially for casual labour and consequently worsened the already unfavourable food security situation in several countries. Remittances have also declined, further tightening households' incomes.

In **Yemen**, the weak macro-economic situation, rising cost of living, declining purchasing power and reduced remittances have pushed additional people into poverty. According to the national Food Security Cluster, about 20.1 million people are

estimated to be 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 in 2020 found that, out of the total population of 7.96 million people in the 133 analyzed districts in the southern provinces of the country, 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) was projected to increase to 3.2 million (40 percent of the analyzed population). According to the October 2020 edition of the FAO-WFP Early Warning Analysis of Acute Food Insecurity Hotspots, "in some areas of Yemen, parts of the population are experiencing a critical hunger situation with extreme depletion of livelihoods, insufficient food consumption and high acute malnutrition. In these areas, any further deterioration over the coming months could lead to a risk of famine."

In **Afghanistan**, between August and October 2020, corresponding to the post-harvest season, it is estimated that a total of 11.15 million people were facing high levels of acute food insecurity (IPC Phase 3 or above) and required urgent humanitarian action. This included around 7.54 million people in IPC Phase 3: "Crisis" and 3.6 million people in IPC Phase 4: "Emergency". About 11.34 million people were also in IPC Phase 2: "Stressed" category and required livelihood support. Between November 2020 and March 2021, during the lean season, around 13.15 million people are likely to experience high levels of acute food insecurity (IPC Phase 3 or above), with nearly 4.3 million people in IPC Phase 4: "Emergency". The key drivers

of food insecurity in the country remain conflict, high food prices, COVID-19 and natural disasters.

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. In addition, spillover effects from the financial crisis in Lebanon are putting 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 **Lebanon**, the COVID-19 pandemic and the measures introduced to contain the spread of the disease have exacerbated the deterioration of economic conditions, with unemployment and poverty increasing and inflation rates skyrocketing. In August 2020 (latest available information), the overall annual inflation rate was estimated at over 120 percent, while food inflation was over 360 percent year on year.

In **Iraq**, although 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 according to the 2020 Humanitarian Needs Overview (HNO) released in November 2019, the actual numbers are likely to be higher as opportunities for casual labour decreased as a result of the COVID-19 measures. In addition, low international oil prices put a dent in public finances and affected the ability of the Government to pay salaries.

CIS IN ASIA³

Planted area of 2021 winter cereals estimated near average

Planting of the 2021 winter cereal crops (mainly wheat), to be harvested from next June, took place in October and November 2020. At the aggregate level, early indications point to a near-average area planted with winter cereals, as larger-than-average plantings in **Azerbaijan** and **Kazakhstan** were outweighed by acreage reductions in **Armenia**, **Kyrgyzstan** and **Tajikistan**.

In southern and southeastern **Kazakhstan**, the main cereal producing areas of the country, conditions of the winter wheat crops were generally

satisfactory, although localized frosts were observed in late October which hampered land preparation and planting operations. In **Turkmenistan** and **Uzbekistan**, precipitation amounts were below average in September and October, but improved in November, benefiting soil moisture levels. Elsewhere in the subregion, planting of the 2021 winter cereal crops was carried out under generally favourable weather conditions.

Near-average cereal harvest in 2020

Harvesting of the 2020 spring cereal crop was completed in October and the aggregate annual cereal production (including the winter crops) is estimated at a near-average level of 34.8 million tonnes. Production of wheat, which normally accounts for about 70 percent of the total subregional cereal output, is estimated at 23.8 million tonnes in 2020, 6 percent below the average as above-average outputs in **Kyrgyzstan** and **Turkmenistan** were offset by below-average harvests in **Armenia**, **Georgia** and **Kazakhstan**. In **Azerbaijan**, **Tajikistan** and **Uzbekistan**,

wheat outputs were estimated at near-average levels. In **Kazakhstan**, wheat production is estimated at 12.5 million tonnes, about 10 percent below the five-year average, due to warmer and drier-than-average weather conditions in May and June 2020, which negatively affected yields in parts of the key wheat-producing northern regions. Subregional production of barley is estimated at a bumper level of 6.14 million tonnes on account of well above-average outputs in **Kazakhstan** and **Azerbaijan**.

Below-average cereal exports forecast in 2020/21

In the 2020/21 marketing year (July/June), subregional cereal exports (mainly wheat) are forecast at about 9 million tonnes, 10 percent below the average. Wheat shipments are forecast at a below-average level of 7.3 million tonnes reflecting reduced export prospects for **Kazakhstan**, the main exporting country of the subregion.

The total subregional import requirement of cereals (mainly wheat) in the

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	23.8	8.8	9.4	9.8	35.3	34.2	34.8	1.6
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	3.2	3.5	3.2	-10.2
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	12.5	4.7	5.1	5.5	18.9	17.1	18.6	8.5
Kyrgyzstan	0.6	0.6	0.7	1.1	1.2	1.2	1.8	1.8	2.0	7.4
Tajikistan	0.9	0.8	0.8	0.4	0.3	0.3	1.3	1.3	1.3	1.3
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	8.1	7.6	-6.5

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.

2020/21 marketing year is forecast at a near-average level of 7.6 million tonnes.

Export and domestic prices of wheat flour remained generally stable

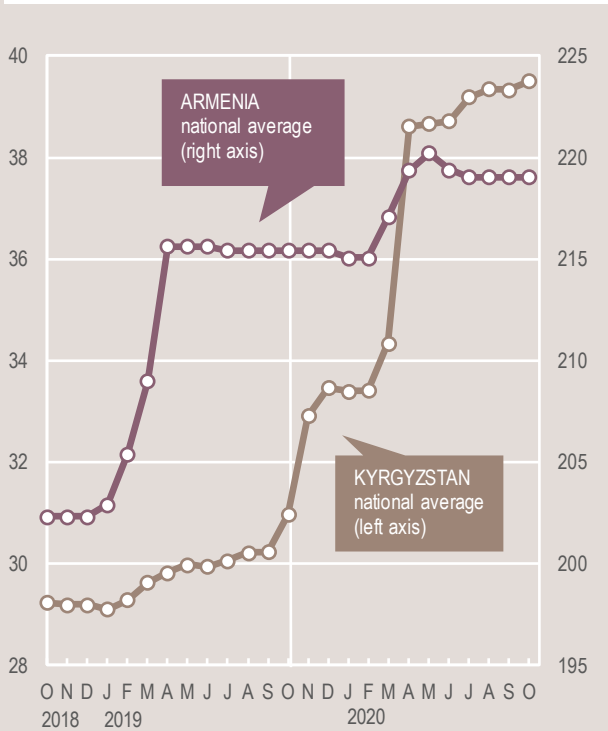
In **Kazakhstan**, export prices of milling wheat declined between May and August 2020, pressured by the availability of the recently harvested wheat crops. In September, prices remained overall stable

amid weak export demand and increased slightly in October.

In importing countries of the subregion, retail prices of wheat flour remained stable in **Kyrgyzstan** and **Tajikistan** between May and October 2020, but at levels well above those a year before. The higher prices are a result of an upsurge in consumer demand during the start of the COVID-19 pandemic and export

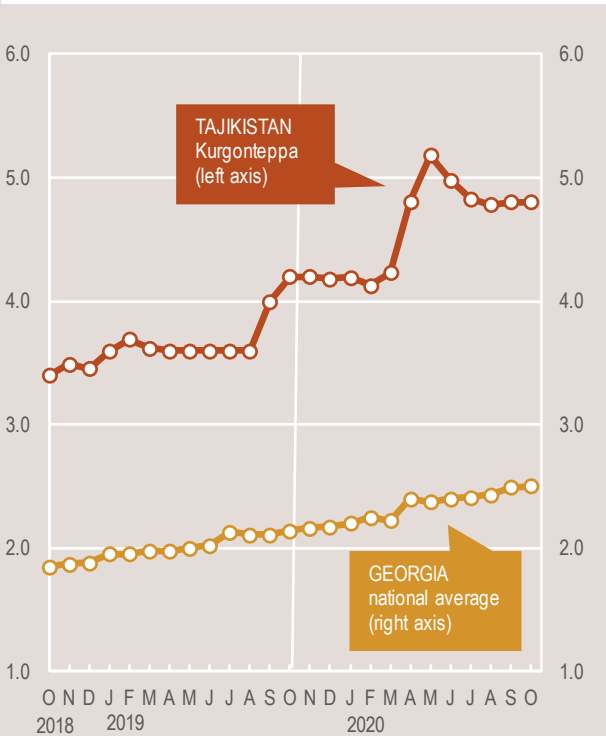
restrictions in Kazakhstan, the main wheat supplier to the two countries, which drove up prices earlier in the year. Between July and October 2020, prices were steady in **Armenia** and at comparable year-on-year levels. In **Georgia**, prices in October were well above those a year earlier reflecting higher prices in the Russian Federation, the main source of wheat imports for the country.

Retail wheat flour prices in selected CIS in Asia countries
(Som/kg) (Armenian Dram/kg)



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
(Somoni/kg) (Lari/kg)



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

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN



Source: GIEWS

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

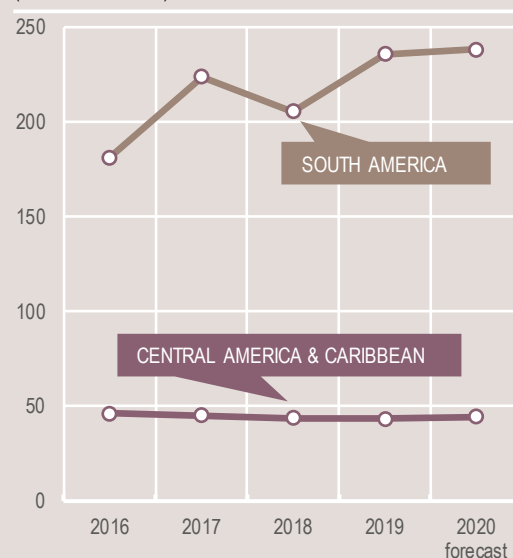
Latin America and the Caribbean Production Overview

Cereal production in 2020 is forecast at 282.6 million tonnes, a new record high. The large outturn mainly reflects substantial maize harvests in South America's main producers, Brazil and Argentina, underpinned by an increase in plantings. The 2020 wheat crop, which is being harvested, is forecast at an average level, as prolonged dry conditions lowered yield prospects in the key producing country, Argentina.

In Central America, the passage of hurricanes Eta and Iota in November affected food crops, particularly beans, as well as the livelihoods of vulnerable households in Guatemala, Honduras and Nicaragua. However, production of maize from the main season crop, harvested prior to the hurricanes in September, is estimated at an above-average level, reflecting large plantings and good yields.

Planting of the 2021 coarse grain crops is ongoing in South America and the total area sown is anticipated to remain at an above-average level, as farmers are responding positively to high prices.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN



Below-average wheat production estimated in 2020

Wheat production, which is almost exclusively concentrated in Mexico, is estimated at a below-average level of 3 million tonnes. In **Mexico**, the 2020 minor spring/summer wheat crop, which accounts for about 5 percent of the national production, is at the vegetative stage, while the main autumn/winter wheat crop was harvested by July. The aggregate output is expected to be more than 10 percent lower than the five-year average. The reduced level mainly reflects a contraction in the area planted, a consequence of a gradual shift to more remunerative horticulture crops. Farmers were also discouraged from planting wheat in 2020 due to soil moisture deficits at planting time during the main season.

Planting of the 2021 main autumn/winter wheat crop started recently

in the key producing state of Sonora amid dry weather conditions. Weather forecasts point to a higher-than-normal probability of below-average rainfall in the December 2020-February 2021 period, raising concerns about crop germination and early development. According to the official planting intention survey, sowings of the 2021 autumn/winter wheat crop are likely to remain at a below-average level.

Maize production expected near the five-year average in 2020

The aggregate subregional 2020 maize output is forecast at about 32 million tonnes, close to the previous five-year average. In **Mexico**, which accounts for more than 85 percent of the subregion's maize output, harvesting of the main season crop is ongoing under favourable weather conditions and production is expected at a near-average level. The output of the minor season maize crop, harvested in the second quarter of 2020, is estimated at an average level as high yields offset the impact of low sowings. Overall, the aggregate 2020 maize output in Mexico is forecast at an average level of 27.6 million tonnes, recovering from the low levels of the past two years. This mainly reflects an increase in the main season planted area, which expanded from a below-average level due to high prices at planting time.

Elsewhere in the subregion, harvesting of the 2020 minor season maize crop is about to start. Crop conditions were generally favourable until excessive rainfall and consequently flooding, brought by two consecutive hurricanes in November caused considerable damage. Substantial crop losses were reported in **Honduras, Guatemala and Nicaragua**, while the torrential rains also had adverse effects, but to a lesser extent, on crops in **El Salvador, Costa Rica, Panama, Belize** and southeastern **Mexico**. Quantification of crop losses of the minor season, which accounts for 20-30 percent of the annual production, is ongoing and the 2020 aggregate maize production remains uncertain. The output from the 2020 main season maize crop, harvested by September, is estimated to be above average reflecting good yields and an expansion in the area sown in most of the countries of the subregion.

In **Haiti**, harvesting of the 2020 second season maize crop is ongoing. Although average yields are forecast, reflecting conducive rainfall distribution and cumulative amounts since August, production is likely to remain at a low level on account of reduced plantings, reflecting high production costs and a shortage of agricultural inputs. Planting of the 2020 third season maize crop started

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	37.3	38.5	2.9	2.9	3.0	44.0	43.5	44.4	2.0
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	3.8
Guatemala	0.0	0.0	0.0	1.9	1.9	1.9	0.0	0.0	0.0	2.0	2.0	2.0	1.7
Honduras	0.0	0.0	0.0	0.6	0.5	0.6	0.1	0.1	0.1	0.7	0.6	0.7	20.8
Mexico	3.5	3.2	3.0	32.8	32.6	33.6	0.3	0.3	0.3	36.5	36.2	36.9	2.0
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	3.4
South America	26.7	28.6	26.9	157.2	184.2	187.0	24.4	22.9	24.2	208.3	235.8	238.2	1.0
Argentina	17.5	19.8	17.0	52.0	63.3	65.3	1.4	1.2	1.2	70.8	84.2	83.5	-0.9
Brazil	5.4	5.2	6.4	88.5	103.8	106.3	11.6	10.5	11.2	105.5	119.5	123.8	3.7

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

Impact of hurricanes Eta and Iota in Central America

The landfall of Hurricane Eta in early November brought torrential rainfall over eastern Nicaragua, northern Honduras, eastern Guatemala, Belize, Costa Rica and Panama which resulted in flooding and landslides. Although downgraded to a tropical storm after it made landfall, the storm affected standing crops and damaged agricultural infrastructure. During the third week of November, Hurricane Iota made landfall in eastern Nicaragua and caused heavy rainfall in Honduras, northern Nicaragua, eastern Guatemala and southern Belize intensifying soil saturations and causing further damage to crops and livelihoods of vulnerable households. The hurricanes severely affected bean crops from the main season, and damaged coffee and oil palm plantations as well as horticulture crops. According to [OCHA](#), about 4.9 million people have been affected across Central America and Mexico, with the largest affected populations located in Honduras (3 million) and Guatemala (900 000).

Hurricane paths and rainfall amounts in cropped areas



Source: GEOGLAM and USAID (for territories/boundaries see Terminology** [page 6](#))

in December and, although the planted area is expected to remain at a low level, crops are likely to benefit from favourable weather conditions that are forecast until March 2021, which augurs well for yield prospects. In **the Dominican Republic**, paddy production is expected to increase at a slower rate in 2020 compared to the previous five years, as prolonged dry weather conditions since June curbed yield prospects and reduced plantings.

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 an expanding appetite for wheat-based products. Cereal import requirements in the 2020/21 marketing year (September/August) are forecast at an above-average level 38 million tonnes.

Prices of beans and maize declined seasonally in the August-October period

Prices of beans declined in the August-October period mainly reflecting increased market availabilities following the commercialization of the minor season harvest and a slowdown in consumer demand compared to the upsurge earlier in the year triggered by the COVID-19 pandemic. As of October, while prices

of red beans were lower year on year in **El Salvador, Honduras** and **Nicaragua**, prices of black beans were above their year-earlier levels in **Guatemala** and **Mexico**. Following a sharp increase in prices of red beans after the passage of Hurricane Eta, the Government of Honduras placed price ceilings on essential food items, including beans, rice and maize tortilla, for one month starting from mid-November.

Prices of white maize decreased in the August-October period in line with seasonal trends in **El Salvador, Guatemala, Honduras** and **Nicaragua**. Prices were lower than a year earlier, mainly reflecting the above-average main season harvests. In **Mexico**, prices of white maize were stable in September, just before the start of the main season

harvest, and remained slightly higher on a yearly basis due to the reduced minor season output harvested in the second quarter of 2020.

In **Haiti**, prices of maize meal and black beans declined seasonally in August and September underpinned by improved market availabilities. Prices of imported food commodities, particularly rice, decreased in September and October, supported by the gradual appreciation of the national currency. However, prices of imported staple foods remained well above their year-earlier values due to generally tight supplies after the poor 2019 output, as well as the reduced harvest in the 2020 main season. Resurgence of socio-political turmoil since September exerted additional pressure on prices, as closures of businesses and

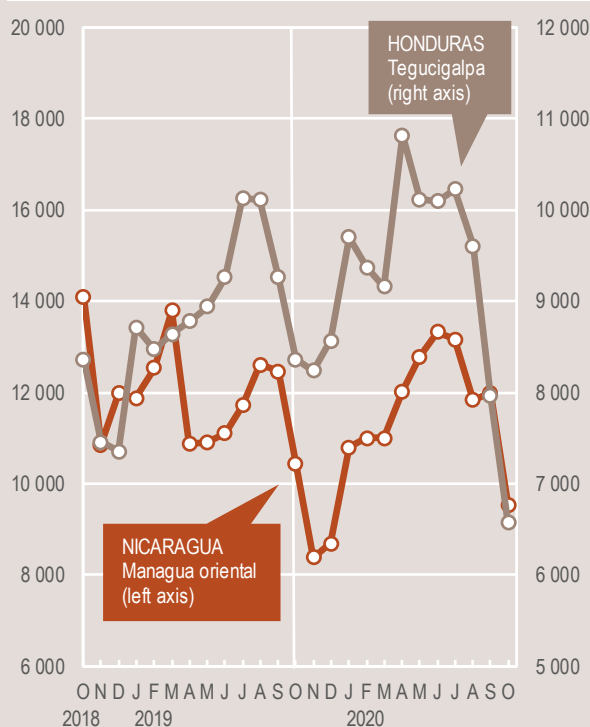
blockages of roads due to insecurity reduced economic activities.

Food security likely to worsen due to the COVID-19 pandemic and hurricanes

According to IPC analyses, about 9.3 million people are estimated to be food insecure and require urgent action in the second half of 2020, with 4 million in **Haiti**, 3.7 million in **Guatemala** and 1.6 million in **Honduras**. The reduced economic activities due to the COVID-19 pandemic and associated reduction in employment, income and remittances exacerbated the pre-COVID-19 food insecurity situations. The passage of two hurricanes in November, which resulted in crop and livelihood losses, is expected to further aggravate conditions of vulnerable households particularly in Guatemala and Honduras.

Wholesale white maize prices in selected Central America countries

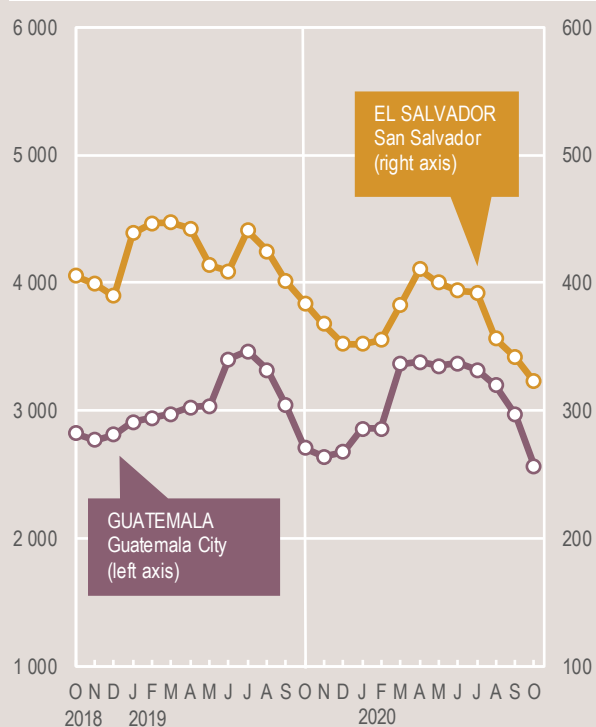
(Cordoba Oro/tonne) (Lempira/tonne)



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

Wholesale white maize prices in selected Central America countries

(Quetzal/tonne) (US dollar/tonne)



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

SOUTH AMERICA



Planted area of the 2021 maize crop forecast well above average

In South America, planting of the 2021 first season maize crop is underway in Argentina and Brazil, and the planted area is officially forecast at a level well above the average, as farmers respond positively to the high domestic prices. In **Argentina**, recent favourable rains partially abated initial concerns of dryness, but more rains are needed for adequate germination and early development of crops in the main producing Buenos Aires and Córdoba departments. In **Brazil**, drier-than-normal weather conditions that have been present since October in key producing southern and central regions are forecast to continue

until next February. These conditions are expected to have a negative impact on planting operations of the main season crops, which usually starts in January.

Maize production estimated at new record in 2020

Subregional maize production is estimated at 173.3 million tonnes in 2020, a new all-time high following the previous record harvest obtained in 2019. The bumper harvest reflects record large-planted areas in the main producing countries, driven by high domestic prices and strong export demand, and above-average yields. In **Brazil** and **Argentina**, where the harvests were completed in August, the 2020 outputs are officially estimated at record highs of 102.5 million and 58.5 million tonnes, respectively. Similarly, in **Uruguay**, near-record sowings in 2020 resulted in an above-average production. In **Bolivia (Plurinational State of)**, where the 2020 season is nearing completion, maize production is expected to increase year on year, but remain slightly below the five-year average. Elsewhere in the subregion, dry weather conditions affected crop yields in **Colombia** and **Paraguay**, where harvests are estimated at below-average levels. In **Chile**, the area sown, which has been declining over the last decade, continued to decrease in 2020 amid drought conditions, and consequently

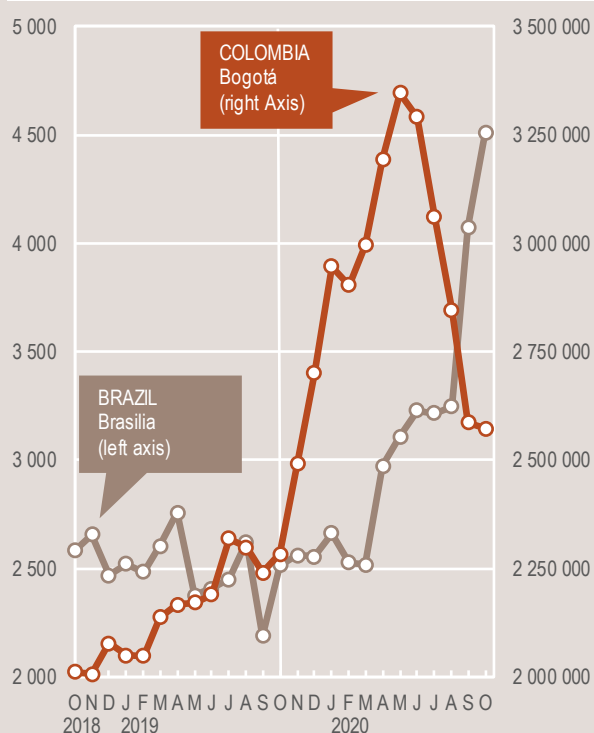
production was nearly 50 percent below the five-year average. In **Ecuador** and **Peru**, the 2020 production is also estimated at a slightly below-average level as low prices induced farmers to reduce plantings. In **Venezuela (Bolivarian Republic of)**, harvesting of the main season maize crop is virtually complete and the aggregate production in 2020, including the minor crop harvested in May, is expected to be significantly lower than the average. Despite generally favourable weather conditions for crop development, high production costs and widespread shortages of agricultural inputs resulted in a substantial contraction in sowings which is the main factor accounting for the production decline.

Harvesting of the 2020 wheat crop is ongoing or is about to start, and aggregate production is forecast at a near-average level of 26.9 million tonnes. In **Argentina**, the wheat sown area is officially estimated at a record level of 6.7 million hectares, as high domestic prices and favourable export prospects incentivized farmers to increase plantings. However, limited rainfall amounts across the key growing areas, except the central southern region of Buenos Aires, have curbed yield prospects and, therefore, production is officially forecast at a slightly below-average level of 17 million tonnes. In **Brazil**, where

Wholesale rice prices in selected countries in South America

(Brazilian Real/tonne)

(Peso colombiano/tonne)

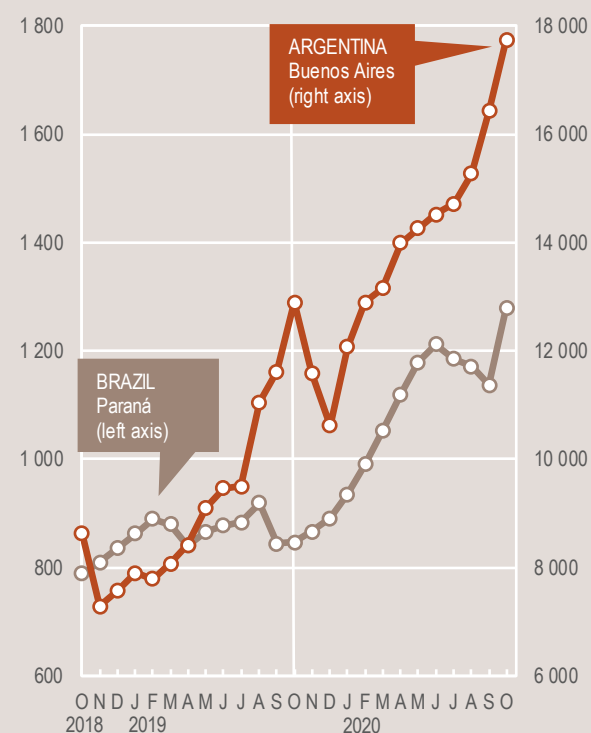


Sources : Departamento Administrativo Nacional de Estadística (DANE), Colombia; Instituto de Economía Agrícola, Brazil.

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.

harvesting of the 2020 crop is nearing completion, production is officially estimated at 6.4 million tonnes, more than 17 percent above the five year average reflecting large sowings and high yields. In **Chile**, although the wheat planted area increased year on year due to remunerative prices, it remained below average, curbing production prospects. Similarly, in **Paraguay** and **Uruguay**, production is expected to be lower than the five-year average due to a contraction in plantings. In addition, in Paraguay, crops have been affected at the grain-filling stage by reduced precipitation amounts since September and yields are expected to be low.

Rice harvests have concluded in most countries and the subregional paddy output is estimated at an average level of 24.2 million tonnes in 2020. Below-average outputs were estimated in **Brazil** and **Uruguay**, but bumper harvests in **Colombia**, **Guyana**, **Paraguay** and **Peru**, driven by large plantings, helped maintain an average aggregate output.

Cereal exports anticipated to remain at high levels in 2020/21

Aggregate cereal exports in the 2020/21 marketing year (March/February) are anticipated at a high level of 95 million tonnes. The large quantity mainly reflects record maize outputs in **Argentina** and **Brazil**, coupled with weak local currencies that have enhanced the export competitiveness of both countries. Of the total export quantity forecast, maize exports account for the largest proportion and the forecast of 74 million tonnes is more than 30 percent above the average.

Prices of wheat and yellow maize generally higher year on year

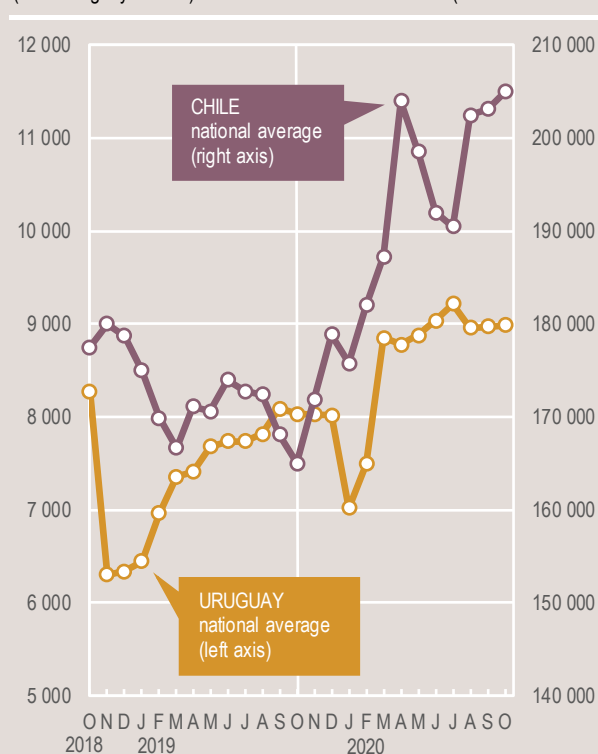
In recent months, concerns over the impact of unfavourable weather conditions on **Argentinian** wheat yields exerted upward pressure on prices, which were higher year on year. Similarly, prices were higher on a yearly basis in **Brazil**, a net importer, as the weaker currency made imports costlier. In **Chile** and **Uruguay**, prices of wheat were firm in September and October before the start of the harvest but remained higher year on year reflecting an expected below-average production in 2020. Prices of

wheat flour were generally stable between August and October in **Bolivia (Plurinational State of)**, **Ecuador** and **Peru**, reflecting adequate import flows. In **Colombia**, prices strengthened and were higher than the previous year's level mainly due to the depreciation of the country's currency and reduced imports in the June-August period.

In **Argentina** and **Brazil**, prices of yellow maize increased seasonally in the August-October period and were higher on a yearly basis reflecting concerns over the impact of the current dry weather conditions on crop development. Robust domestic and international demand added further support to the high prices. In **Chile** and **Peru**, prices rose in September and October on account of tight domestic availabilities. In **Bolivia (Plurinational State of)** and **Colombia**, where the 2020 second harvest concluded in September, prices generally weakened in recent months pressured by large market supplies.

During the August-October period, prices of rice decreased seasonally in **Colombia**. Nevertheless, prices in October were still higher on a yearly basis reflecting the effects of an uptick in demand amid the COVID-19 pandemic that led to sharp price increases in March and April. Prices of rice also decreased during the August-October period in **Ecuador** and **Peru** due to improved market availabilities from the minor season harvest. By contrast, in **Brazil**, prices of rice increased in October for the second consecutive month as strong export sales in the April-September period exacerbated the seasonally tight supply situation and as a result prices were well above the year-earlier levels. Prices were also higher year on year in **Uruguay** due to strong export sales in the January-August period.

Wholesale wheat prices in selected countries in South America
(Peso uruguayo/tonne) (Peso chilien/tonne)



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

Food security of Venezuelan refugees and migrants likely to deteriorate

Due to the severe economic crisis, about 5.4 million people left **Venezuela (Bolivarian Republic of)** during the last six years and settled in neighbouring countries, mostly in Colombia (1.7 million), Peru (1 million), Chile (457 000) and Ecuador (417 000). A recent WFP survey found that more than 70 percent of Venezuelan migrants experienced a decrease in their income due to the COVID-19 pandemic with severe consequences in terms of their access to food. As a result, about 135 000 migrants returned to the country as of October 2020, which may strain the already limited resources. Unemployment rates have also increased compared to the pre-COVID-19 situation, further diminishing livelihood options for Venezuelans. Furthermore, the Government's fiscal resources were reduced by the fall in international oil prices since March 2020, limiting their capacity to implement social protection measures for vulnerable households.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA



Unfavourable 2020 production prospects*

Republic of Moldova: Dry weather conditions

*/** See Terminology (page 6)

Source: GIEWS

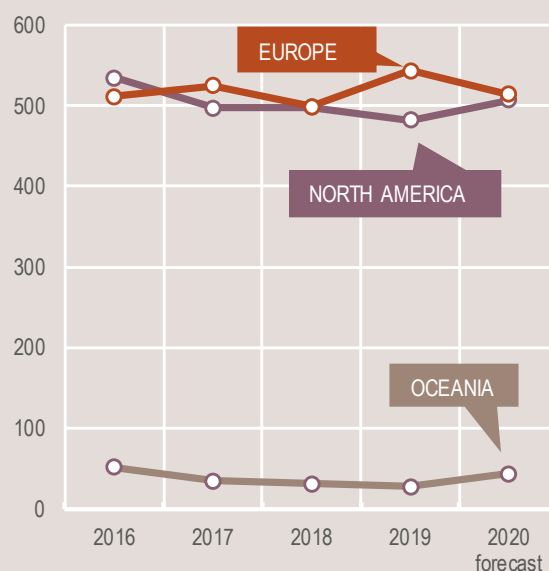
North America, Europe and Oceania Production Overview

In North America, cereal production is estimated to have recovered strongly in the United States of America in 2020, reflecting a bumper maize output that more than compensated for a smaller wheat harvest. Similarly, cereal production in Canada is forecast to rise in 2020 and could be the second largest on record. Planting of the 2021 winter wheat crop is ongoing, amid drier-than-normal weather conditions in southern parts of the United States of America.

In the European Union, aggregate production is estimated at a below-average level due to lower harvests of wheat and coarse grains, underpinned by adverse weather and smaller plantings. Among the CIS countries in Europe, a large wheat harvest drove up the overall cereal output in 2020 which is estimated at an above-average level. Plantings of the 2021 wheat crop are underway across Europe and in the European Union, the area sown is expected to recover from the low level in the previous year.

In Oceania, cereal production is forecast to recover substantially in Australia in 2020, following the drought-reduced harvests obtained in 2018 and 2019. The wheat output in 2020 is seen to almost double on a yearly basis.

Cereal production (million tonnes)



NORTH AMERICA



Plantings of the 2021 wheat crop foreseen to increase

In the **United States of America**, planting of the 2021 winter wheat crop is virtually complete. Early indications suggest that the area sown has increased, driven by higher prices. Drier-than-normal weather conditions since October in the central and southern Plains, influenced by the prevailing La Niña weather phenomenon, have affected wheat crops.

Total cereal production in 2020 is forecast at 443 million tonnes, an above-average level and a strong recovery from the reduced outturn in 2019. The maize harvest is nearly complete and production is foreseen to reach an above-average level of 368.5 million tonnes. This production forecast has been trimmed several times during the season as the planted area was revised downward compared to initial expectations and adverse weather conditions in the third quarter of 2020 that caused crop losses and impaired yield prospects. Harvesting of the 2020 winter and spring wheat crops concluded earlier in the year and the aggregate production is estimated at 49.7 million tonnes, 8 percent

below the previous five-year average, mainly reflecting lower yields.

In **Canada**, total cereal production in 2020 is estimated at 63.7 million tonnes, the second largest crop on record. Wheat production is estimated at an above-average level of 34 million tonnes, about 2 million tonnes more than the previous year, reflecting an upturn in yields that offset the impact of a contraction in the planted area. Maize production is estimated at 14 million tonnes in 2020, moderately higher than both the five-year average and the previous year's outturn, underpinned by an increase in yields due to favourable weather.

some eastern areas and continued to impede planting operations. Overall, weather conditions have been generally conducive for crop establishment and the 2021 wheat acreage is expected to recover strongly from the previous year's low level.

With harvesting of the 2020 cereal crops mostly complete, aggregate production in the European Union is estimated at a below-average level of 277 million tonnes, reflecting harvest reductions for both wheat and coarse grains. Aggregate production of wheat is estimated at a below average level of 124 million tonnes, underpinned by low plantings. Aggregate production of maize is foreseen at a below-average level

of 60.5 million tonnes in 2020, about 10 million tonnes less than the 2019 output. This reduction mostly rests on hot and dry weather conditions during the summer months that dragged down yields, notably in **France** and **Romania**.

EUROPE



EUROPEAN UNION

Wheat acreage of 2021 crops expected to recover

In the **European Union**, following abundant rains in October that delayed planting of the 2021 winter wheat crop, dry weather conditions in November enabled sowings to regain momentum. However, heavy rainfall persisted in

CIS IN EUROPE

Area planted with 2021 winter cereals estimated slightly above average

Planting of the 2021 winter cereal crops, principally wheat, is virtually complete and the aggregate area sown is estimated to be slightly above average. In the **Russian Federation**, plantings are officially

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	85.0	84.9	83.8	405.5	388.5	412.7	9.1	8.4	10.3	499.6	481.8	506.8	5.2
Canada	31.0	32.3	34.1	26.8	28.7	29.6	0.0	0.0	0.0	57.8	61.1	63.7	4.4
United States of America	54.0	52.6	49.7	378.7	359.8	383.1	9.1	8.4	10.3	441.8	420.7	443.1	5.3
Europe	257.9	266.0	249.9	254.4	273.3	260.3	4.1	4.1	4.1	516.4	543.4	514.3	-5.4
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	124.1	157.1	166.6	150.0	2.9	2.9	2.9	310.2	325.2	277.0	-14.8
Russian Federation	73.5	74.5	83.0	41.2	42.3	42.6	1.1	1.1	1.1	115.8	117.9	126.7	7.5
Serbia	2.6	2.5	2.9	6.8	7.9	8.6	0.0	0.0	0.0	9.4	10.4	11.5	10.0
Ukraine	26.3	28.3	25.5	39.7	46.4	40.9	0.1	0.1	0.1	66.1	74.8	66.5	-11.1
Oceania	22.0	15.6	29.3	14.1	12.2	14.3	0.5	0.1	0.1	36.6	27.9	43.7	56.3
Australia	21.6	15.2	28.9	13.4	11.6	13.6	0.5	0.1	0.1	35.5	26.8	42.6	58.8

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.

estimated at an above-average level of 19.2 million hectares, underpinned by strong export demand for wheat. However, below-average precipitation since September in the main winter growing areas of North Caucasian and Southern federal districts resulted in low soil moisture levels as of mid-November, raising concerns over yield prospects for the 2021 winter crops. In addition, insufficient snow cover increases the risk of crop damage during cold spells. In **Ukraine**, below-average precipitation in August and the first two dekads of September hampered planting operations of the 2021 winter crops. As a result, the total area sown is estimated at a slightly below-average level of 7.1 million hectares. Improved rainfall from late September increased soil moisture levels and supported crop establishment, and as of mid-November winter crop conditions were reported to be mostly favourable; final yields will, however, largely depend on weather conditions during the December-March period. In **Belarus** and **the Republic of Moldova**, planting of winter cereals took place under generally favourable weather conditions and the area planted is estimated at a near-average level. Soil moisture levels were reported to be favourable for crop emergence and establishment in most croplands.

Unfavourable weather conditions reduced 2020 maize yields

Harvesting of the 2020 winter cereals was finalized in August, while the spring crops were harvested by mid-November. The aggregate 2020 subregional cereal production is estimated at 201 million tonnes, 5 percent above the five-year average. The bulk of the output is wheat grain, production of which is estimated at 111.2 million tonnes, the second largest output on record on account of a large area sown. Regarding maize, despite the adverse impact of dry weather conditions in August and September, an all-time high area planted resulted in an above-average

output, estimated at 47 million tonnes in 2020. The subregional barley output is estimated at an above-average level of 29.4 million tonnes, mostly due to high yields in the Russian Federation, the main producing country in the subregion.

Above-average cereal exports forecast in 2020/21

Cereal exports in the 2020/21 marketing year (July/June) are forecast at 94.4 million tonnes, 6 percent above the average, mostly due to expectations of substantial exports of wheat, estimated at 55.6 million tonnes. In **the Russian Federation**, wheat shipments (accounting for almost 70 percent of the subregional wheat exports) are expected to reach 39 million tonnes, about 20 percent above average reflecting ample domestic supplies, competitive prices and strong demand from importing countries.

On 11 November 2020, the Russian Ministry of Agriculture issued a draft proposal for the implementation of a 15-million-tonne quota on cereal exports for the period from 15 February to 30 June 2021. In **Ukraine**, wheat exports in 2020/21 are forecast to fall to 16.5 million tonnes due to low domestic supplies; this level is below the 17.5-million-tonne quota established by the Government of Ukraine in August. Regarding maize, subregional exports are forecast at a near-average level of 28.3 million tonnes, as reduced shipments from **the Russian Federation** and **the Republic of Moldova** are expected to offset an above-average level of exports from **Ukraine**.

Export and domestic prices of wheat increased sharply since September

In **the Russian Federation** and **Ukraine**, export prices of milling quality wheat, after decreasing between May and August 2020, rose sharply in September and October. These recent increases reflected trends in the international market and were also driven by concerns over the 2021 winter wheat crops as well as strong demand by importers. Prices in October reached their highest levels since January 2015. The announcement of export quotas in both countries exerted additional upward pressure on prices. Domestic prices of wheat in **the Russian Federation** and **Ukraine** also increased steeply from September and by October 2020 prices were well above those a year before, particularly in Ukraine.

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



Source: International Grains Council.

OCEANIA



Cereal production seen to increase sharply in 2020

In **Australia**, harvesting of the 2020 winter wheat crop is anticipated to conclude early next year. Wheat

production is currently forecast at 28.9 million tonnes, almost double the drought-reduced harvest in 2019. The positive outlook 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. However, the presence of the La Niña weather phenomenon has heightened the probability of above-average rainfall in the next months and this could result in harvest delays and may impair crop quality.

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	36.0	35.9	38.3	36.3	36.5	36.7
Coarse grains	28.4	28.4	29.2	28.7	28.0	26.3
Rice	35.5	34.8	35.3	36.8	35.6	35.1
Total cereals	31.8	31.7	32.9	32.3	31.8	30.7
Ratio of major cereal exporters' supplies to market requirements (%)¹						
	121.4	123.6	122.9	116.9	118.7	115.0
Ratio of major exporters' stocks to their total disappearance (%)²						
Wheat	18.4	19.8	21.0	18.1	15.3	14.8
Coarse grains	15.0	14.8	15.7	16.1	14.9	13.7
Rice	20.7	18.9	18.1	22.6	24.2	25.3
Total cereals	18.0	17.8	18.3	18.9	18.1	18.0
	Annual trend growth rate 2010-2019	2016	2017	Change from previous year 2018 2019		2020
Changes in world cereal production (%)	2.0	3.0	1.2	-1.7	2.3	1.3
Changes in cereal production in the LIFDCs (%)	2.1	3.7	3.6	2.6	1.7	2.2
Changes in cereal production in the LIFDCs excluding India (%)	2.0	2.1	1.0	3.7	2.0	0.4
		2017	2018	2019	2020*	Change 2020* over 2019*
Selected cereal price indices³						
Wheat		89.0	99.0	95.3	99.7	4.8%
Maize		88.6	99.1	94.6	98.7	4.4%
Rice		99.0	106.3	101.5	110.1	8.5%

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-November average.

Table A2. World cereal stocks¹
(million tonnes)

	2016	2017	2018	2019	2020 estimate	2021 forecast
TOTAL CEREALS	794.9	839.6	880.3	869.8	872.5	866.4
Wheat	242.8	265.3	287.1	271.8	276.6	282.9
held by:						
- main exporters ²	70.4	79.9	84.3	71.2	62.4	57.4
- others	172.4	185.4	202.8	200.6	214.2	225.5
Coarse grains	380.0	401.2	416.8	412.9	414.1	402.5
held by:						
- main exporters ²	106.4	119.8	130.4	132.2	127.3	119.1
- others	273.6	281.4	286.4	280.7	286.8	283.4
Rice (milled basis)	172.1	173.2	176.4	185.1	181.8	181.0
held by:						
- main exporters ²	34.5	33.2	32.3	39.6	43.0	46.2
- others	137.6	140.0	144.1	145.5	138.8	134.8
Developed countries	171.0	197.2	198.6	191.1	178.3	173.3
Australia	7.2	9.5	7.3	8.8	7.1	11.2
Canada	10.0	12.5	11.1	9.4	9.6	10.6
European Union ³	40.8	35.2	45.3	44.4	44.8	39.5
Japan	7.3	6.6	6.7	6.5	6.8	6.8
Russian Federation	11.9	20.2	22.9	14.2	12.4	13.0
South Africa	3.7	1.8	5.1	3.6	2.6	3.9
Ukraine	9.7	8.4	8.0	7.2	4.8	5.9
United States of America	76.1	95.8	88.8	91.3	82.6	71.8
Developing countries	623.8	642.4	681.7	678.7	694.2	693.2
Asia	527.7	546.8	566.2	565.6	586.6	589.8
China (Mainland)	378.2	409.4	424.4	421.9	436.8	436.0
India	42.3	34.6	42.1	50.9	56.0	59.1
Indonesia	10.2	9.2	10.2	11.5	9.0	7.7
Iran (Islamic Republic of)	9.9	11.6	10.6	9.3	9.9	11.6
Korea, Republic of	4.9	4.5	4.1	2.6	2.6	2.9
Pakistan	5.8	5.8	5.0	3.2	2.4	2.4
Philippines	4.1	3.7	4.1	4.8	4.0	3.8
Syrian Arab Republic	1.7	1.3	1.7	1.4	2.2	2.7
Turkey	7.3	6.0	7.1	6.6	9.9	9.5
Africa	56.6	54.7	61.5	62.2	58.1	58.2
Algeria	5.7	5.6	5.3	6.6	6.9	6.0
Egypt	7.7	7.4	6.9	5.6	6.2	6.6
Ethiopia	4.2	4.8	5.6	6.3	7.2	6.8
Morocco	8.4	5.9	6.7	7.3	5.8	4.8
Nigeria	2.9	2.5	2.9	3.8	3.1	3.2
Tunisia	1.0	1.0	1.1	1.0	1.2	1.2
Central America	7.7	9.9	10.5	10.0	9.7	9.4
Mexico	4.6	6.5	7.6	7.5	7.3	7.3
South America	31.3	30.5	43.1	40.3	39.3	35.3
Argentina	7.7	7.4	12.4	13.0	12.8	9.5
Brazil	14.2	12.7	19.9	16.8	16.5	17.0

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 - 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 - April	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
2020 - September	246	220	246	166	185	217
2020 - October	273	245	257	187	217	236
2020 - November	275	250	259	193	226	247

Sources: International Grains Council and USDA.

¹ Delivered United States f.o.b. Gulf.² Delivered United States Gulf.³ Up River f.o.b.

Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2019/2020 or 2020
(thousand tonnes)

	Marketing year	2018/19 or 2019			2019/20 or 2020
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		26 123.5	1 009.6	27 133.1	29 136.6
East Africa		10 361.7	698.0	11 059.7	11 950.0
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	1 940.0
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	485.0	23.0	508.0	548.0
United Republic of Tanzania	Jun/May	954.0	11.0	965.0	985.0
Southern Africa		2 652.1	14.7	2 666.8	3 475.6
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	1 450.0
Zimbabwe	Apr/Mar	291.6	3.1	294.7	911.0
West Africa		10 588.8	140.9	10 729.7	11 027.4
Coastal Countries		5 972.7	48.5	6 021.2	5 865.5
Benin	Jan/Dec	471.0	6.0	477.0	189.0
Côte d'Ivoire	Jan/Dec	1 910.0	5.5	1 915.5	1 675.5
Ghana	Jan/Dec	1 646.7	5.0	1 651.7	1 785.0
Guinea	Jan/Dec	782.0	5.5	787.5	957.5
Liberia	Jan/Dec	495.0	12.0	507.0	493.0
Sierra Leone	Jan/Dec	376.0	14.0	390.0	487.0
Togo	Jan/Dec	292.0	0.5	292.5	278.5
Sahelian Countries		4 616.1	92.4	4 708.5	5 161.9
Burkina Faso	Nov/Oct	713.0	11.0	724.0	752.0
Chad	Nov/Oct	151.0	38.6	189.6	189.6
Gambia	Nov/Oct	223.1	1.5	224.6	293.0
Guinea-Bissau	Nov/Oct	130.0	6.3	136.3	149.3
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	636.0
Senegal	Nov/Oct	1 806.0	4.0	1 810.0	2 135.0
Central Africa		2 520.9	156.0	2 676.9	2 683.6
Cameroon	Jan/Dec	1 360.0	10.0	1 370.0	1 360.0
Congo	Jan/Dec	329.0	2.0	331.0	306.0
Central African Republic	Jan/Dec	73.0	23.0	96.0	95.4
Democratic Republic of the Congo	Jan/Dec	740.0	120.0	860.0	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 Countries¹ in 2019/2020 or 2020

(thousand tonnes)

	Marketing year	2018/19 or 2019			2019/20 or 2020
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
ASIA		39 735.8	1 180.8	40 916.6	39 514.2
Cis in Asia		4 934.6	0.1	4 934.7	4 744.2
Kyrgyzstan	Jul/Jun	611.9	0.1	612.0	638.5
Tajikistan	Jul/Jun	1 228.0	0.0	1 228.0	1 187.0
Uzbekistan	Jul/Jun	3 094.7	0.0	3 094.7	2 918.7
Far East		24 214.2	365.7	24 579.9	25 233.0
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	718.5
Nepal	Jul/Jun	1 183.8	2.0	1 185.8	1 260.0
Viet Nam	Jul/Jun	13 840.4	0.0	13 840.4	15 283.0
Near East		10 587.0	815.0	11 402.0	9 537.0
Afghanistan	Jul/Jun	3 212.0	100.0	3 312.0	2 292.0
Syrian Arab Republic	Jul/Jun	3 395.0	290.0	3 685.0	2 815.0
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		67 335.9	2 200.5	69 536.4	70 192.4

Source: FAO

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

* Estimates not yet available.

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

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ISBN 978-92-5-133680-9 ISSN 2707-2223



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CB2334EN/1/12.20