Food and Agriculture Organization of the United Nations

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CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

45

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 45 countries, including 34 in Africa and 9 in Asia, are in need of external assistance for food. Conflicts and climate-related shocks are critical factors underpinning the high levels of severe food insecurity. The effects of the COVID-19 pandemic have exacerbated vulnerabilities and resulted in increased humanitarian needs.

Asia	2.1
Africa	3.4
Central America and the Caribbean	0.6
South America	2.0
North America	3.7
Europe	-4.3
Oceania	79.0
World	**1.9**

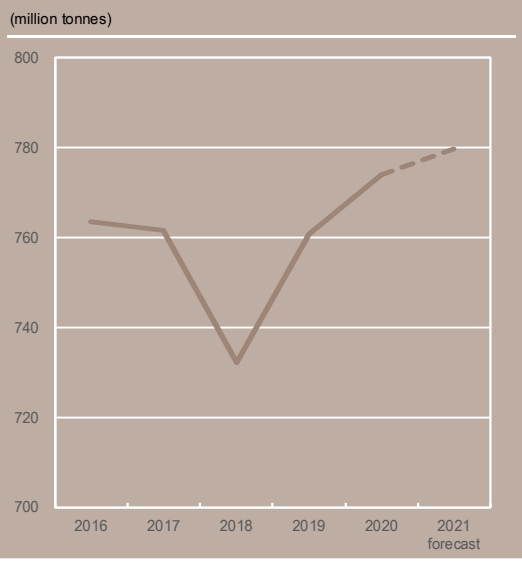
World cereal production 2020 over 2019

(yearly percentage change)

+1.9%

World wheat production 2021 over 2020

+1.0%



REGIONAL HIGHLIGHTS

AFRICA Despite extreme weather events, generally conducive weather conditions have supported favourable 2021 production prospects in Southern Africa, but conditions are mixed in North Africa due to rainfall shortages. With the 2020 crops recently harvested in East Africa, production is estimated to have increased moderately, despite floods and pest infestations. Similarly, small production upturns were estimated in West Africa, but conflicts and floods contained production in Central Africa.

ASIA The production outlook for the 2021 wheat crop in Far East Asia is favourable, resting on large plantings and conducive weather conditions in the main producers. Dryness prevailed in parts of Near East Asia, particularly in Afghanistan, diminishing 2021 production prospects following good harvests in 2020. In CIS Asia, beneficial weather conditions are supporting favourable prospects for the 2021 wheat crop.

LATIN AMERICA AND THE CARIBBEAN In South America, large plantings are foreseen to push up cereal production to a new record high in 2021, but dryness in parts has cut back yield prospects. Despite the impact of the two major hurricanes, cereal production in 2020 increased in Central America, with plantings of the 2021 coarse grains crops underway.

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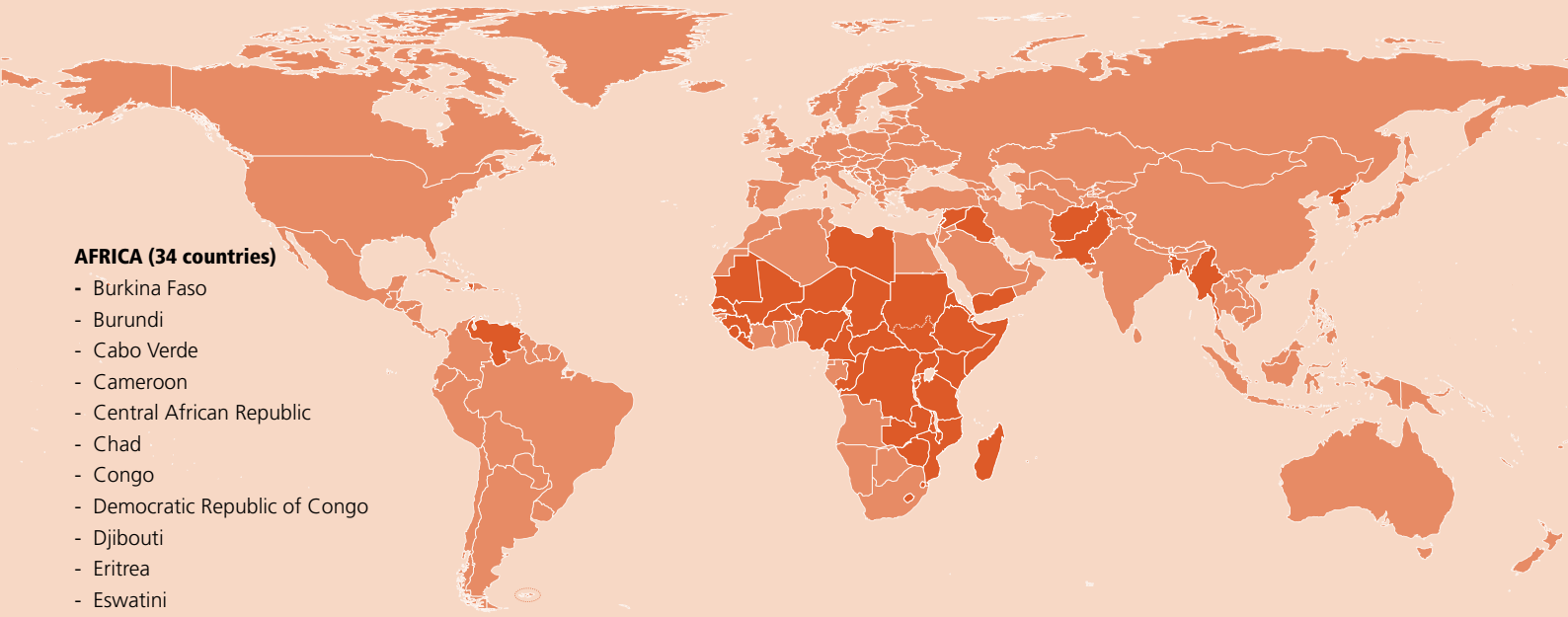
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



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

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

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

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

Source: GIEWS, 2021. Conforms to the United Nations map No. 4170 Rev. 19, 2020.

The following countries have been affected, to varying degrees, by the COVID-19 pandemic and as a result, the impact of 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

- Armed violence connected to the 27 December 2020 elections resulted in internal displacement of over 240 000 people since mid-December. By early February 2021, about half had returned home, but over 117 000 people remained displaced. An additional 105 000 people had fled the country, mostly to the Democratic Republic of the Congo.
- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3 and above) is estimated at 1.9 million in the September 2020-April 2021 period.

Kenya

Floods, desert locusts

- About 850 000 people were estimated to be severely food insecure in the October-December 2020 period in rural arid and semi-arid lands that cover most of the country, down from 3.1 million people in late 2019 due to consecutive favourable rainy seasons. By contrast, the food security situation 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.

Somalia

Floods, civil insecurity, desert locusts

- About 1.6 million people are estimated to be in need of emergency assistance in the January-March 2021 period.

Zimbabwe

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

- An estimated 3.38 million people are in need of urgent humanitarian assistance until the end of March 2021, primarily on account of the reduced agricultural output in 2020, significantly high food prices and income losses due to the effects of the economic downturn.

WIDESPREAD LACK OF ACCESS

Burundi

Floods, landslides

- About 1.33 million people were estimated to be severely food insecure in the October-December 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 1.14 million people are projected to be in Phase 3: "Crisis" and above in the June-August 2021 period due to persisting insecurity in Lac and Tibesti regions which continues to disrupt livelihood activities and to cause population displacements.
- About 336 124 people were displaced due to insecurity in Lake Chad Region. In addition, nearly 488 801 refugees from the Central African Republic, Nigeria and the Sudan reside in the country due to conflicts.

Democratic Republic of the Congo

Persisting civil insecurity

- According to the latest IPC analysis, published in September 2020, 19.6 million people (33 percent of the analyzed population) are estimated to be severely food insecure in the first semester of 2021, 10 percent below the high figure estimated for the July-December 2020 period. The decline is mainly attributable to a modest recovery of economic activities and the improved food availability in this period of the year.
- Fighting in neighbouring Central African Republic in early 2021 resulted in an influx of about 92 000 refugees into the northern provinces of North Ubangi, South Ubangi and Bas Uele.

Djibouti

Floods

- About 194 000 people are estimated to be severely food insecure in the January-August 2021 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.

Eritrea

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

Ethiopia

High food prices, floods, desert locusts, insecurity, impact of previous droughts

- About 12.9 million people are estimated to be severely food insecure between January and June 2021 mainly in SNNP, Oromia, Somali and Afar regions. The main drivers are: localized crop and pasture losses due to locust infestations, high food prices and the negative impact of the COVID-19 pandemic on incomes and food prices. Humanitarian needs have sharply increased in Tigray Region after the conflict erupted in November 2020.

Niger

Civil conflict

- According to the latest "Cadre Harmonisé" analysis, about 1.7 million people are assessed to need humanitarian assistance between June and August 2021 due to the increase in security incidents which have resulted in widespread disruption of agricultural and marketing activities, diminishing livelihood opportunities of households and their food security.
- An estimated 298 458 people have been displaced in Diffa, Tahoua and Tillabery regions due to civil conflicts. In addition, the country hosts almost 233 131 refugees, mainly from Nigeria and Mali.

Nigeria

Persisting conflict in northern areas

- According to the latest "Cadre Harmonisé" analysis, about 12.9 million people are assessed to need humanitarian assistance between June and August 2021 as a result of a worsening conflict that is driving new population displacements, especially in the northeast, northwest and northcentral regions. Over 2.7 million people are estimated to be internally displaced in northeastern states of Adamawa, Borno and Yobe, communal clashes in northwest/northcentral 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, widespread floods and the negative impact of restrictive measures related to the COVID-19 pandemic. About 5.82 million people (48 percent of the total population) are estimated to be severely food insecure in the December 2020-March 2021 period.
- Particular concern exists for Jonglei State and neighbouring Pibor Administrative Area, where 78 percent of the population is estimated to be severely food insecure and 11 000 individuals are facing IPC Phase 5: "Catastrophe" levels, after two consecutive years of widespread flooding resulting in severe livelihood losses.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the latest "Cadre Harmonisé" analysis, about 2.7 million people are estimated to need humanitarian assistance between June and August 2021. In Centre-Nord and Sahel regions, insecurity continues to cause population displacements, further deteriorating the food security situation.
- Due to the conflict, about 1.07 million people have been displaced, of which 50 percent live in Centre Nord Region. In addition, about 20 250 refugees, mostly from Mali, are still residing in 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 October 2020 "Cadre Harmonisé" analysis, about 2.7 million people were estimated to be severely food insecure (Phase 3 or above) in the October-December 2020 period, well above the previous year's level. This is mainly the result of conflict, socio-political unrest, flooding and COVID-19-related economic shocks.
- In Far North Region, incursions by Boko Haram increased by 55 percent in 2020 compared to the previous year and triggered new population displacements.

Congo

Floods

- The Government of Congo 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 these areas, at the end of December, the number of flood-affected people was estimated at 168 000.
- The Likoula Department hosts 27 000 refugees from the Central African Republic and 21 000 refugees from the Democratic Republic of the Congo.

Eswatini

Localized shortfalls in production, reduction in income-generating activities

- Between October 2020 and March 2021, an estimated 366 000 people are food insecure and in need of humanitarian assistance, above the estimate for the same period in 2019/20. The deterioration reflects localized shortfalls in cereal production, 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 are residing in the country.

Lesotho

Localized shortfalls in production, loss of income-generating activities

- Between October 2020 and March 2021, an estimated 582 000 people are facing acute food insecurity, 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 550 000 people are estimated to be in Phase 3: "Crisis" and above in the June-August 2021 period due high food prices, including mostly imported rice and a significant increase in overall inflation. The country is also hosting approximately 8 200 refugees.

Libya

Civil insecurity, economic and political instability, high food prices

- The 2021 Humanitarian Needs Overview estimated the total number of people in need of humanitarian assistance at 1.3 million (23 percent of the population), of which 0.7 million require food assistance. Half of the people in need of humanitarian assistance are internally displaced or migrants that are residing in, or transiting through the country.

Madagascar

Drought in southern areas and limited income-earning opportunities

- An estimated 1.35 million people are food insecure in southern and southeastern regions and require urgent humanitarian assistance at least up until April 2021. The poor conditions are also reflected in high rates of acute malnutrition among children in these regions.
- The impact of the COVID-19 pandemic, particularly the loss of incomes due to the economic slowdown, successive below-average cereal outputs and the effects of a prevailing drought in 2021 are the key drivers of food insecurity.

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 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 955 000 people are estimated to be in Phase 3: "Crisis" and above in the June-August 2021 period as a result of the escalation of the conflict that continues to cause population displacements, combined with the impacts of the pandemic and weather shocks.
- Over 311 193 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 410 000 people are assessed to need humanitarian assistance between June and August 2021 as a result fodder production deficits in Trarza, Brakna, Gorgol, Guidimakha and Assaba districts.
- About 67 622 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

- An estimated 2.9 million people require urgent humanitarian assistance, at least up until March 2021, reflecting the adverse impacts of 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 and led to large population displacements.

Namibia

Localized shortfalls in staple food production, economic slowdown

- About 441 000 people are estimated to be food insecure and in need of

humanitarian assistance between October 2020 and March 2021.
- Although the availability of food 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 850 000 people are estimated to need humanitarian assistance between June and August 2021 due to the effects of adverse weather events (drought and floods) on cereal and fodder production.
- An estimated 14 500 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone
High food prices
- About 1.3 million people are estimated to be severely food insecure during the June-August 2021 period on account of high food prices and eroded purchasing power, resulting in acute constraints on households' access to food.

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.

Uganda
Floods, refugee influx
- The number of severely food insecure people is estimated at 2 million in the September 2020-January 2021 period in 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.
- About 891 000 refugees from South Sudan and about 423 000 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
- The effects of the COVID-19 pandemic have aggravated food insecurity across the country and its impacts have kept the number of people in need of assistance at similar levels to 2019/20, despite the larger cereal output in 2020 and lower prices. An estimated 2 million people are in need of assistance between October 2020 and March 2021.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Lebanon
Financial and economic crisis
- In August 2020, the United Nations Economic and Social Commission for Western Asia estimated that more than 55 percent of the population live in poverty, up from 28 percent in 2019. Current figures are likely to be higher due to a fall in households' purchasing power.

Syrian Arab Republic
Civil conflict, stagnant economy
- A nationwide food security assessment estimates that about 12.4 million people (60 percent of the overall population) are now food insecure, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and rapidly worsening economy.
- 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 2020, affected large numbers of people in 2020 in southern parts.

Yemen
Conflict, poverty, floods, high food and fuel prices
- Between January and June 2021, the number of food insecure (IPC Phase 3 or above) is projected to increase by nearly 3 million to 16.2 million people. Out of these, an estimated 11 million people will likely be in IPC Phase 3:"Crisis", 5 million in IPC Phase 4: "Emergency" and the number of those in IPC Phase 5: "Catastrophe", will likely increase to 47 000.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan
Civil conflict, population displacement, economic slowdown
- Between November 2020 and March 2021, about 13.15 million people (over two fifths of the total population) are estimated to be in severe acute food insecurity and require urgent humanitarian assistance, including 8.52 million people in IPC Phase 3: "Crisis" and 4.3 million people in IPC Phase 4: "Emergency".

Bangladesh
Economic constraints, monsoon floods and high prices of the main staple food
- Food insecurity poverty levels have increased due to income losses and a decline in remittances caused by the effects of the COVID-19 pandemic.
- Recurrent floods throughout 2020 caused damage to the agricultural sector and destroyed houses and infrastructure, further aggravating food insecurity conditions.
- According to the latest figures from UNHCR (January 2021), about 860 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in Cox's Bazar District.
- Prices of rice, the country's main staple, reached near-record levels in most markets in January 2021, constraining access to food.

Iraq

Civil conflict, low oil prices, economic slowdown

- The 2021 Humanitarian Needs Overview identified 4.1 million people in need of humanitarian assistance, of which 2.4 million have acute humanitarian needs. The number of severely food insecure people is estimated at about 435 000, while 731 000 are vulnerable to food insecurity.

Myanmar

Conflict, political instability and economic constraints

- The political crisis, following the military takeover on 1 February 2020, resulted in increased tensions and unrest throughout the country. The current uncertain political situation may further compromise the fragile situation of vulnerable households and the Rohingya IDPs residing in the country.
- Persisting conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large-scale population displacements 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 displacements, economic constrains

- The country hosts close to 1.4 million registered and unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and are straining the already limited resources of the host communities.
- Poverty levels have increased due to losses of income-generating opportunities.

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. Food insecurity situations of migrants reportedly worsened in 2020 due to losses of income-generating opportunities in the host countries amid the COVID-19 pandemic. The expected slow recovery of the host countries' economy is likely to only marginally restore livelihoods of migrants.
- According to WFP's food security assessment, conducted in the third quarter of 2019, about 2.3 million people in the country (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, socio-political turmoil

- About 4.4 million people are forecast to be facing severe acute food insecurity and are in need of urgent food assistance in the March-June 2021. The high levels of food insecurity are the result of reduced 2020 main season cereal output and high food prices. Reduced remittances and income losses amid the COVID-19 pandemic and socio-political turmoil are likely to exacerbate the already poor food security situation.

Terminology

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

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

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

page 12 (Africa)
page 23 (Asia)

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

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview

Estimate for global cereal production in 2020 raised sharply, while early prospects for cereal production in 2021 are positive

FAO's latest forecast for world cereal **production** in 2020 has been lifted by 17 million tonnes in March compared to the previous month and now stands at 2 761 million tonnes, a 1.9 percent year-on-year increase.[1] The adjustment principally reflects a 7.5-million-tonne increase in the world wheat production estimate, driven by recently released official data from Australia, the European Union, Kazakhstan, and the Russia Federation. The world coarse grains output estimate has also been raised by 6.9 million tonnes, with most of the increase concentrated in West Africa, where recent official data showed larger-than-previously-expected maize outputs, and in the European Union, where the estimate for maize output in Romania was revised upwards on higher yields. An upward revision to global barley production, reflecting improved yields in Australia and the Russian Federation, further bolstered the estimate for global coarse grains production. The forecast for global rice production has also been raised by 2.6 million tonnes and is now 2.1 percent above the revised estimate for 2019. This upward revision made in March primarily mirrors more buoyant expectations for production in India, where plantings of the secondary Rabi crop were reported to have significantly exceeded year-earlier levels. Production has also been raised for the United Republic of Tanzania and the Islamic Republic of Iran, more than offsetting modest downward revisions for various other countries.

Table 1. World cereal production
(million tonnes)

	2018	2019	2020 estimate	Change: 2020 over 2019 (%)
Asia	1 185.1	1 196.0	1 220.6	2.1
Far East	1 085.7	1 089.3	1 107.4	1.7
Near East	65.2	73.5	78.0	6.2
CIS in Asia	34.2	33.2	35.2	6.1
Africa	198.6	192.4	198.9	3.4
North Africa	37.5	36.2	32.7	-9.5
West Africa	66.0	65.5	66.9	2.1
Central Africa	6.8	6.7	6.6	-2.7
East Africa	56.6	55.4	56.4	1.8
Southern Africa	31.8	28.6	36.3	27.0
Central America and the Caribbean	42.5	42.4	42.7	0.6
South America	197.8	228.8	233.4	2.0
North America	495.4	479.3	496.8	3.7
Europe	497.2	542.0	518.9	-4.3
European Union[1]	294.2	324.1	281.5	-13.1
CIS in Europe	188.0	202.7	202.2	-0.2
Oceania	30.9	27.9	50.0	79.0
World	2 647.4	2 708.8	2 761.3	1.9
Developing countries	1 615.3	1 650.7	1 686.8	2.2
Developed countries	1 032.1	1 058.1	1 074.5	1.6
- wheat	732.1	760.7	774.0	1.7
- coarse grains	1 408.0	1 445.3	1 474.1	2.0
- rice (milled)	507.3	502.8	513.2	2.1

Note: Includes rice in milled terms. Totals and percentage change computed from unrounded data.

[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.

[1] For further information on global food markets please see FAO World Food Situation.

The forecast for global cereal **utilization** in 2020/21 has been raised to 2 766 million tonnes, 4.3 million tonnes higher than what was reported in February by FAO and 2 percent (54 million tonnes) above the 2019/20 level. Following a 2.2-million-tonne upward adjustment, global rice utilization in 2020/21 is now anticipated to expand by 2 percent year on year to a record level of 514 million tonnes driven mainly by food use, but also supported by an expected mild recovery in non-food uses of rice, for animal feed in particular. Higher feed use of barley is foreseen in Australia and the European Union, on top of the greater-than-earlier-expected food consumption of maize in Africa, lifted the latest forecast for 2020/21 global coarse grains utilization by 3.6 million tonnes to 1 497 million tonnes, representing a 2.8 percent increase from 2019/20. Despite a slight downgrade to the wheat 2020/21 utilization forecast this month, world wheat utilization is still set to increase year on year by 0.5 percent to 754.5 million tonnes.

FAO's forecast for global cereal **stocks** ending in 2021 has also been scaled up in March compared to the projection in February by 9 million tonnes and is now pegged at 811 million tonnes. Despite this upward revision, world cereal stocks in 2020/21 are expected to fall by 0.9 percent (7.6 million tonnes) below their opening levels, resulting in a drop in the global cereal stock-to-use ratio from 29.6 percent in 2019/20 to 28.6 percent in 2020/21, a seven-year low. Trimmed utilization, on top of greater production, has boosted the forecast for global wheat stocks by 7.7 million tonnes from the previous month to a record 292 million tonnes, 5.4 percent higher than their opening levels. The forecast for world rice stocks at the close of 2020/21 was also raised, primarily on larger inventories in India reflecting the strong pace of public domestic procurement, putting global rice stocks on par with their abundant opening levels. Although lifted marginally since last month, global coarse grains stocks are still anticipated to decline by 6.4 percent from their opening levels in view of foreseen significant drawdowns of maize inventories in the United States of America and China (mainland).

FAO's forecast for world **trade** in cereals in 2020/21 has been lowered month on month to 464 million tonnes but is still up 5.5 percent (24 million tonnes) from 2019/20. Total trade in coarse grains is forecast to expand by 8.9 percent (18.7 million tonnes) in 2020/21 (July/June) to 230 million tonnes, despite a cut of 2.7 million tonnes compared to the figure FAO reported in February on account of a weaker maize import demand from the European Union. World wheat trade in 2020/21 (July/June) is currently pegged at a record 186.6 million tonnes, 1.2 percent (2.3 million tonnes) above the previous season, following a 2-million-tonne upward revision this month on increased imports by China (mainland), Turkey and Pakistan. FAO's forecast of world trade in rice in 2021 (January-December) remains largely unvaried at 48 million tonnes, up 7 percent from 2020 and a three-year high.

Early outlook for 2021 crops

Looking ahead, current indications suggest a small rise in world cereal production in 2021. While most of the **wheat** crop in the Northern Hemisphere is still dormant and Southern Hemisphere countries are yet to plant, FAO's preliminary forecast for global wheat production in 2021 points to a third consecutive annual increase to 780 million tonnes, a new record. The bulk of the growth is expected to come from the European Union, where wheat plantings are forecast to recover from last year's low level, expanding by more than 5 percent in 2021. Coupled with an expected upturn in yields, the European Union's wheat production in 2021 is anticipated to rebound by almost 9 percent to 137 million tonnes. Similarly, production in the United Kingdom is forecast to recover from the previous year's low and surpass 14 million tonnes, on larger plantings and higher yields. In the Russian Federation, the effects of dry weather conditions in the early part of the growing season have diminished production prospects for the 2021 wheat crop compared to the bumper outturn of the previous year. Although beneficial snowfall in January partly abated these concerns, production is, nevertheless, forecast to decline by 7 million tonnes in 2021. In Ukraine, owing to overall conducive weather with sufficient snow that prevented crops from freezing, wheat production is expected to rise moderately to a near-average level in 2021. In Asia, production increases to above-average levels are forecast in several major producers, including India and Pakistan, underpinned supported by government support and beneficial weather. Wheat crop conditions in China (mainland) are also favourable and production in 2021 is expected to remain near average. Production outlooks in Near East Asian countries are, however, mixed, as abnormal dryness in several countries has cut yield prospects. In the United States of America, unconducive weather conditions since October 2020 has curbed yield prospects and despite a forecast expansion in total plantings, production in 2021 is set to remain close to last year's output of 50 million tonnes. In Canada, with the bulk of the wheat crop produced in the summer and yet to be planted, production is officially projected to decline marginally to 33 million tonnes on lower yields.

Regarding production of **coarse grains**, the 2021 crops are to be harvested in the next months in the Southern Hemisphere countries but are yet to be planted in countries north of the equator. In South America, maize outputs in Argentina and Brazil are forecast at well above-average levels in 2020 on expected large sowings, although less-than-ideal weather has curtailed yield and overall production prospects. In Southern Africa, the production outlook is generally favourable despite extreme weather events that caused localized crop losses. In South Africa, the main producer in the subregion, a price-driven increase in maize sowings and almost ideal weather conditions are expected to support a near-record maize output in 2021.

Table 2. Wheat production: Leading producers
(million tonnes)

	Average 5yrs	2019	2020 estimate	2021 forecast
European Union[1]	143.1	155.7	125.2	137.0
China (mainland)	133.4	133.6	134.2	135.5
India	100.4	103.6	107.6	109.0
Russian Federation	78.4	74.5	85.9	79.0
United States of America	52.8	52.6	49.7	50.0
Canada	32.5	32.3	35.2	33.0
Ukraine	26.1	28.3	25.1	26.0
Pakistan	25.4	24.4	25.3	26.0
Australia	23.8	15.2	33.3	26.0
Turkey	20.3	19.0	20.5	19.5
Argentina	18.7	19.8	17.6	19.0
Iran (Islamic Republic of)	14.3	14.5	14.0	14.5
Kazakhstan	13.9	11.5	14.3	14.0
United Kingdom of Great Britain and Northern Ireland	-	-	9.7	14.0
Egypt	8.8	9.0	9.0	9.0
Other countries	66.6	66.9	67.5	68.5
World	758.4	760.7	774.0	780.0

[1]Data for the European Union prior the year 2020 includes the United Kingdom of Great Britain and Northern Ireland.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

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

	2018/19	2019/20 estimate	2020/21 forecast	Change: 2020/21 over 2019/20 (%)
Cereal production[1]	479.2	487.6	502.4	3.0
excluding India	256.0	260.1	265.4	2.0
Utilization	516.7	528.8	544.8	3.0
Food use	391.7	399.4	410.7	2.8
excluding India	222.7	228.2	234.0	2.5
Per caput cereal food use (kg per year)	151.9	152.5	154.4	1.2
excluding India	154.9	155.4	155.9	0.3
Feed	55.4	58.5	61.0	4.3
excluding India	40.5	42.3	43.6	3.0
End of season stocks[2]	107.9	111.4	113.4	1.8
excluding India	60.6	57.1	58.6	2.6

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

Table 4. Cereal production of LIFDCs
(million tonnes)

	5-year average	2019	2020 estimate	Change: 2020 over 2019 (%)
Africa (37 countries)	105.7	111.4	114.9	3.1
East Africa	52.8	55.4	56.4	1.8
Southern Africa	9.9	10.2	11.0	8.1
West Africa	36.6	39.1	41.0	4.7
Central Africa	6.5	6.7	6.5	-2.7
Asia (11 countries)	357.1	375.1	386.4	3.0
CIS in Asia	10.6	10.4	10.4	0.0
Far East	337.8	354.1	364.9	3.0
India	252.5	266.5	277.9	4.3
Near East	8.7	10.6	11.1	4.7
Central America and the Caribbean (2 countries)	1.1	1.1	1.1	0.1
Oceania (1 country)	0.0	0.0	0.0	0.0
LIFDCs (51 countries)	463.9	487.6	502.4	3.0

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

Early production outlook generally favourable for 2021 cereal crops

Among the Low-Income Food-Deficit Countries (LIFDCs)[2], planting of the 2021 cereal crops began in the last quarter of 2020 in *Southern Africa* and *Asia*, while sowing operations are yet to start in *East Africa*, *Central Africa* and *West Africa*. In the regions where plantings have taken place, 2021 production prospects are mostly favourable mainly reflecting beneficial weather conditions, with the exception of the countries in *Near East Asia* where abnormal dryness has adversely affected crops.

In *Southern Africa*, harvesting of the 2021 crops is expected to start from April and production prospects are favourable in **Lesotho**, **Malawi** and **Zimbabwe**. There are, however, some concerns for crops in southern regions of **Madagascar** and northern parts of **Mozambique**, where substantial rainfall deficits have been recorded since the start of the season and will likely curtail national outputs. Conflict in northern Mozambique has also contributed to diminishing production prospects. In *East Africa*, the bulk of the 2021 cereal crops will be planted from March/April. Weather forecasts point to average to above-average precipitation for the March-May rainy season in most areas, bolstering early production prospects. However, in conflict-affected areas, including **South Sudan** and the Tigray Region of **Ethiopia**, disruptions to farming activities are likely to hamper planting operations and access to agricultural inputs. In *West Africa*, sowing of the 2021 cereal crops will also begin in March/April. Although the security situation has improved in some parts of Liptako Gourma and Lake Chad regions since late 2020, the effects of conflicts are expected to continue to undermine farmers' productive capacities and consequently curtail outputs in 2021 in these areas. Similarly, persisting conflicts in *Central Africa* continue to adversely affect agricultural activities. In *Asia*, reflecting an expansion in plantings and beneficial weather conditions, a bumper 2021

[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

wheat harvest is forecast in **India**, and the output could even surpass the record level reached in 2020. In *Near East Asia*, rainfall deficits in **the Syrian Arab Republic** and **Afghanistan** have curbed production prospects of the 2021 wheat crop.

Production increased in 2020, mostly concentrated in Asia

FAO's estimate for the aggregate cereal production of LIFDCs in 2020 stands at 502.4 million tonnes, a well above-average level and nearly 15 million tonnes more than the outturn in 2019. The larger output is mostly associated with production upturns in *Asia*, notably in **India**, driven by large plantings, and **the Syrian Arab Republic**, where improved security conditions helped foster a production increase. Production upturns were also recorded in several countries in *West Africa*, notably **Burkina Faso**, **the Niger** and **Senegal**.

Imports forecast to increase to an above-average level in 2020/21

Aggregate cereal imports by LIFDCs in the 2020/21 marketing year are forecast at an above-average level of 74.1 million tonnes, 4.4 million tonnes higher on a yearly basis. The increased quantity mainly reflects strong import demand in *West Africa* and *Southern Africa*, where initial concerns over 2020 domestic cereal outputs and the effects of the COVID-19 pandemic prompted countries to secure sufficient supplies. In *Central African* and *East African* countries, imports are forecast to increase moderately to keep the pace with growing domestic consumption needs. Cereal imports are also forecast to increase among *Asian* LIFDCs, especially in **Bangladesh**, due to heightened demand for both feed and food, and in **Afghanistan** and **Uzbekistan** following reduced cereal harvests in 2020.

Table 5. Cereal imports of LIFDCs

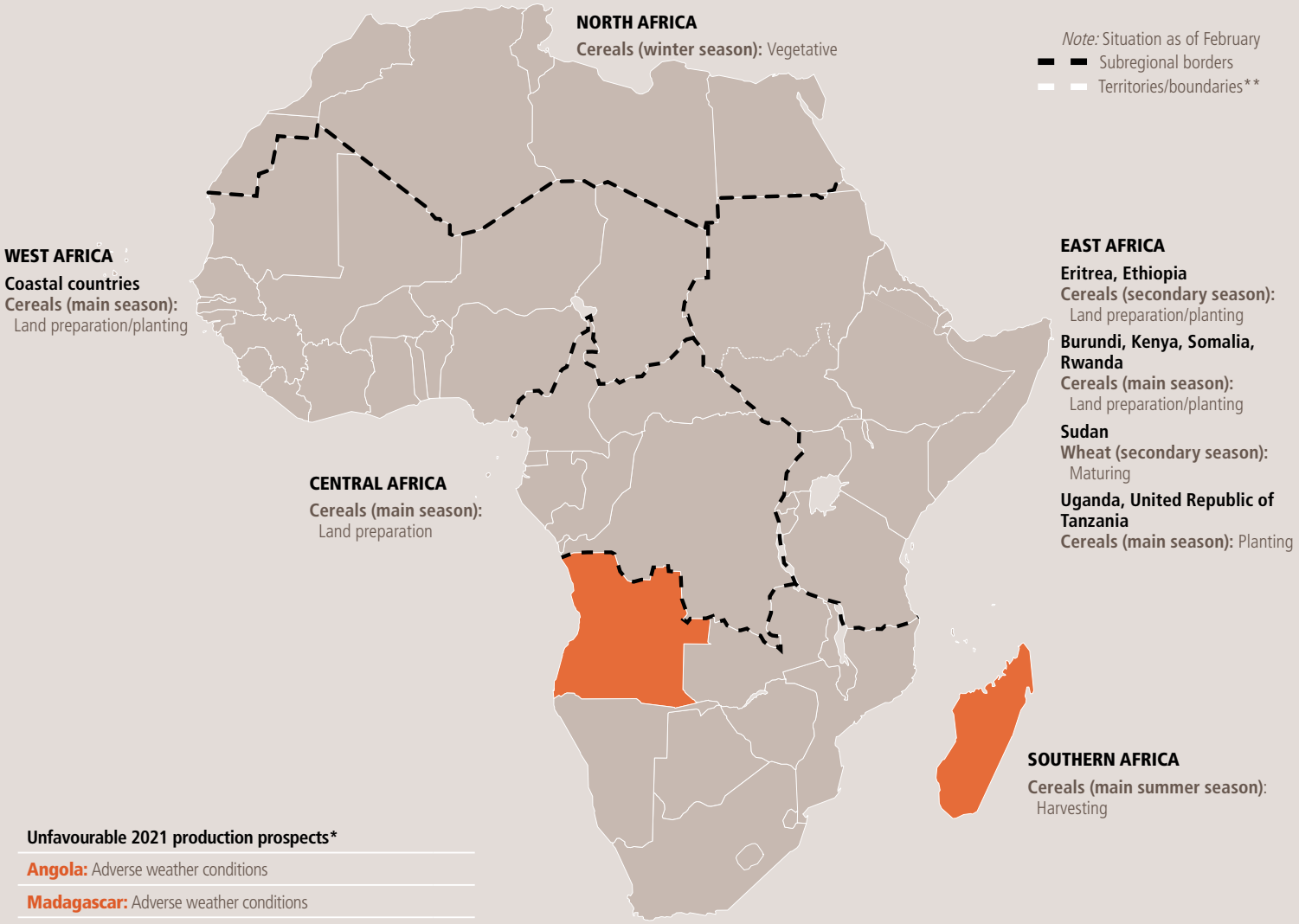
(thousand tonnes)

	2018/19 or 2019	2019/20 or 2020		2020/21 or 2021	
	Actual imports	Import estimate	*of which food aid*	Import requirement[1]	*of which food aid*
Africa (37 countries)	*27 343*	*28 663*	*1 182*	*30 819*	*1 173*
East Africa	*11 194*	*12 050*	*823*	*12 332*	*820*
Southern Africa	*2 609*	*3 067*	*20*	*3 521*	*17*
West Africa	*10 943*	*10 932*	*183*	*12 138*	*179*
Central Africa	*2 597*	*2 614*	*156*	*2 828*	*156*
Asia (11 countries)	*40 874*	*39 211*	*1 001*	*41 724*	*947*
CIS in Asia	*4 933*	*4 692*	*0*	*5 126*	*0*
Far East	*24 506*	*25 060*	*191*	*26 887*	*102*
Near East	*11 435*	*9 459*	*810*	*9 712*	*845*
Central America and the Caribbean (2 countries)	*1 425*	*1 520*	*10*	*1 487*	*10*
Oceania (1 country)	*62*	*62*	*0*	*64*	*0*
LIFDC (51 countries)	*69 704*	*69 455*	*2 193*	*74 094*	*2 130*

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



Unfavourable 2021 production prospects*

Angola: Adverse weather conditions

Madagascar: Adverse weather conditions

*/** See Terminology (*page 6*).
Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

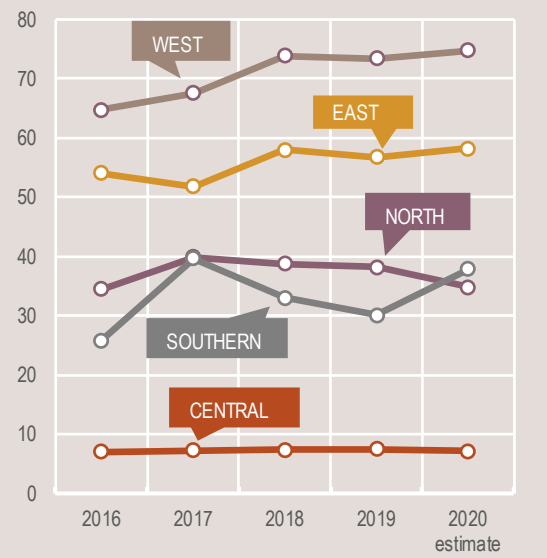
Source: GIEWS, 2021. Conforms to the United Nations map No. 4045 Rev. 8.1, 2018.

Africa Production Overview

Aggregate cereal production in Africa is forecast at an above-average level of 212.8 million tonnes in 2020, 7 million tonnes higher on a yearly basis. The upturn almost entirely reflects production recoveries in Southern Africa, owing to conducive weather conditions. In East Africa, national outputs increased moderately or remained unchanged in 2020, except in Somalia where floods and pest infestations dragged the harvest below the average. The aggregate cereal harvest in West Africa increased moderately and reached a new high in 2020. Lower-than-average outputs were estimated in North Africa in 2020 because of abnormal dryness and in Central Africa the impacts of conflicts and floods kept production at a near-average level.

Regarding the 2021 cereal crops, harvesting activities are expected to begin in Southern Africa from April and production prospects are favourable on account of conducive weather conditions, notwithstanding the impact of cyclones and abnormal dryness in parts. The outlook in North Africa, with crops to be harvested in the second quarter of the year, is mixed and improved precipitation is needed in the next months. Planting of the 2021 crops in West Africa, East Africa and Central Africa will commence from April.

Cereal production
(million tonnes)



NORTH AFRICA

Production prospects of 2021 crops improved, but sustained precipitation needed

Planting of the 2021 winter cereals, for harvest from May, was completed in January. In **Morocco**, estimated cumulative rainfall amounts between September and December 2020 accounted only for two-thirds of the average, but the distribution was sufficient to facilitate planting and early crop development. Favourable rainfall since early January, with some areas receiving twice the average amounts, improved production prospects for 2021 cereals crops. Planting in **Algeria** and **Tunisia** took place under favourable conditions. However, by mid-February 2021, short-term dryness prevailed in most cropping areas of **Algeria** due to below-average precipitation since mid-January. In **Tunisia**, except in some areas in the north that have experienced soil moisture deficits, overall crop conditions are favourable due to plentiful rains. In **Egypt**, most of the cereal crops are irrigated and preliminary production forecasts point to an average output of 9 million tonnes. Conflict on the most fertile lands in **Libya** continues to have a negative impact on agricultural activities.

Below-average cereal production in 2020 increases import requirements

The subregion's aggregate cereal production in 2020, curbed by unfavourable rainfall, is estimated at 34.8 million tonnes, including 16.5 million tonnes of wheat and 3 million tonnes of barley. The total output in 2020 is about 9 percent below the average outturn of the previous year. The largest production decline was recorded in **Morocco**, where the output decreased by 60 percent compared to the five-year average. Year on year production decreases 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.

Food inflation rates remained at modest levels in late 2020

The economies of all countries in the subregion continue to be affected by the global economic slowdown related to the COVID-19 pandemic and the measures introduced to contain it, which constrained income from the tourism and oil sectors. The decrease in employment opportunities continues to affect the households' purchasing power, especially for informal sector workers in urban areas.

Despite the strengthening of international food prices since May 2020, the year on year food inflation rates in the fourth quarter of 2020 (latest information available) eased or remained at low levels. Prices of basic food commodities remain subsidized by the governments across the subregion, buffering the transmission of any eventual price changes to final consumers. In **Morocco**, in December 2020, the annual food inflation rate decreased to minus 1.7 percent, down from 0 percent one month before, while in **Egypt** it decreased from 3.6 percent to 2.8 percent over the same period. Similarly, in **Algeria,** food prices declined by 0.8 percent year on year in November 2020 (last information available), compared to a rate of 1.3 percent in October 2020. On the other hand, in **Tunisia**, the annual food inflation rate increased from 4.4 percent in November 2020 to 4.9 percent in December 2020.

In **Libya**, updated information on the food price inflation has not been available since April 2020. The 2021 Libya Humanitarian Needs Overview estimated the total number of people in need of humanitarian assistance at 1.3 million (23 percent of the population, up from 0.9 million one year earlier) and about half of them are either internally displaced or migrants that are residing in, or transiting through, the country. Out of the population in need of humanitarian support, 700 000 people also require food assistance, double the estimate from 2020.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
North Africa	19.2	18.7	16.5	13.1	12.8	11.6	6.5	6.8	6.6	38.7	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	8.9	9.0	9.0	8.8	8.5	8.6	6.5	6.7	6.5	24.2	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

Land preparation of 2021 crops underway in coastal countries

Land preparation for the 2021 main season cereal crops is ongoing in the bi-modal rainfall areas of the coastal countries along the Gulf of Guinea and planting operations are about to start, with the arrival of seasonal rains. In most countries of the Sahel, as the rainy season starts later, planting of the 2021 crops is expected to begin in May. Off-season harvests of cereals and vegetables during the dry season between February and March are still underway, supported by adequate soil moisture availability. In the regions of Liptako Gourma, Lake Chad and northeast **Nigeria**, the widespread conflict continues to hamper agricultural activities, limiting the access to lands and depleting households' productive assets. Although the security situation has improved in some areas since late 2020, and governments and humanitarian agencies continue to assist the crisis-affected households through input distributions and resilience strengthening programmes, production prospects of the 2021 crops remain uncertain.

Cereal production in 2020 estimated at above-average levels

Harvesting activities of the 2020 coarse grains and rice crops concluded in December 2020 in the Sahel, while harvesting of the second season cereal crops continued until end-January 2021 in the coastal countries along the Gulf of Guinea. Support to farmers from governments, in terms of the provision of improved seeds, fertilizers and extension and marketing services, coupled with favourable rains, kept yields at above-average levels in most countries. Despite some localized crop losses due to flooding, particularly in Mali, Niger, Nigeria and Senegal, and on account of pests (grasshoppers, caterpillars and Fall Armyworms), the 2020 aggregate cereal output in West Africa is estimated to have increased moderately on a yearly basis and reached an all-time high of 74.8 million tonnes.

The subregion's aggregate cereal import requirement for the 2020/21 marketing year (November/October) is estimated at approximately 20 million tonnes, slightly above the previous five-year average and the previous year.

In several countries of the subregion, the pastoral situation has improved significantly compared to the past three years, reflecting the abundant availability of pasture and water for livestock. Crop residues from the main harvest have also contributed to improving the situation for pastoralists. However, in areas of **Mauritania**, **Senegal**, **Mali**, **the Niger** and **Chad,** deficits in pasture resources were recorded. Additionally, in the conflict-affected areas of the Liptako Gourma, Lake Chad**,** northeastern and northwestern **Nigeria** and **Tibesti** areas, access to pastoral resources as well as transhumance movements remain difficult due the insecurity. Clustering of animals in accessible areas has led to a rapid depletion of grazing resources and is increasing tensions between farmers and herders, with a significant impact on the livelihoods of local households. As a result, the pastoralists' lean season in these areas is expected to start earlier than usual. The transfer of live animals from the Sahelian countries to the coastal countries in early 2021 remained lower than in the corresponding period in 2020 due to the impacts of the COVID-19 pandemic, which hampered trade flows from major outlets.

Livestock prices are generally stable throughout the subregion and the terms of trade for livestock/cereals are mostly favourable for pastoralists. However, compared to the previous year, the terms of trade have deteriorated due to higher cereal prices, with consequent reductions in pastoralists' purchasing power. Moreover, in the areas affected by fodder deficits and/or limited access to grazing resources due to insecurity, the market value of animals is expected to decrease between March and June, at the peak of the pastoral lean season, as body conditions are expected to deteriorate.

Mixed trends for prices of coarse grains

Supplies of major commodities are generally satisfactory, reflecting the arrival of the recently harvested crops and sufficient quantities of imports. Prices of domestically produced coarse grains followed mixed trends in January, depending on the performance of the 2020 harvests.
In the areas affected by the conflict, marketing activities have been significantly constrained, triggering a surge in prices above the levels of a year earlier. The reintroduction of measures to contain the second wave of the COVID-19 pandemic since November 2020 significantly

Table 7. West Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
West Africa	47.9	52.0	53.4	20.1	21.3	21.3	68.1	73.4	74.8	1.8
Burkina Faso	4.2	4.6	4.9	0.4	0.4	0.4	4.6	4.9	5.3	7.9
Chad	2.5	2.6	2.6	0.3	0.3	0.3	2.8	2.9	2.9	-0.5
Ghana	2.6	3.5	3.7	0.7	0.9	1.0	3.3	4.4	4.6	5.0
Mali	6.5	7.1	7.0	2.8	3.2	3.0	9.3	10.3	10.0	-2.4
Niger	5.6	5.2	5.5	0.1	0.1	0.1	5.7	5.3	5.6	4.9
Nigeria	19.2	21.3	21.0	8.0	8.4	8.2	27.3	29.8	29.2	-1.9

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

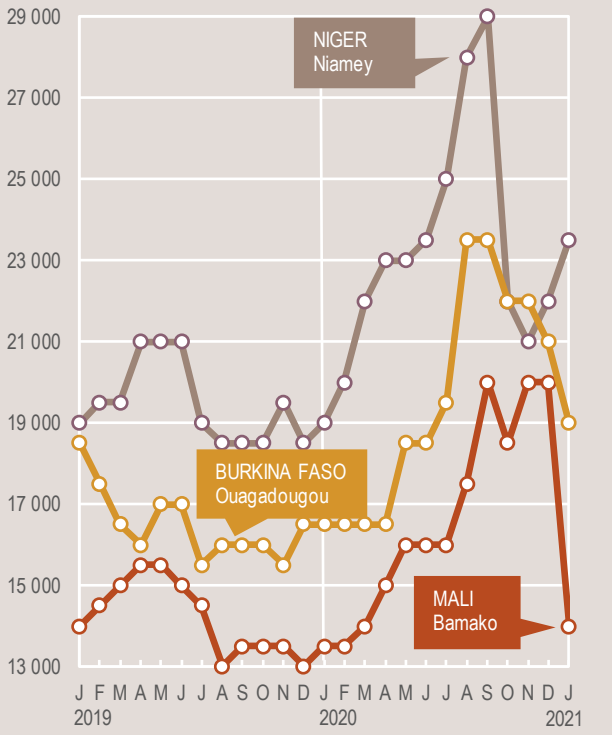
[1] Total cereals includes wheat, coarse grains and rice (paddy).

constrained economic activities in the subregion and added further support to prices. In **the Niger** and **Chad**, prices of coarse grains strengthened for the second consecutive month in January in several markets despite the recently completed main season harvest. The increase in prices was driven by the impacts of COVID-19 measures on the supply chain and the persistent insecurity in some areas of both countries. In addition, increasing transportation costs and a strong demand from traders in neighbouring the Sudan provided further support to prices. By contrast, in **Burkina Faso**, **Mali** and **Senegal**, prices of coarse grains continued to decline at the start of 2021 owing to favourable supply conditions and continued delivery of humanitarian assistance to insecure areas. Prices, however, remained above their year-earlier values as the COVID-19 pandemic restrictive measures disrupted the supply routes. In coastal countries along the Gulf of Guinea, prices of maize in **Ghana, Benin** and **Togo** remained generally stable from September to December 2020, reflecting adequate market supplies from the recent harvests. In **Nigeria**, prices of coarse grains increased in December, after declining in October-November and reached levels higher than a year earlier. This is mainly attributed to supply disruptions following the introduction of COVID-19 containment measures and the continuing poor macro-economic conditions, including high inflation rates and the reduced value of the national currency against the US dollar. In addition, localized production shortfalls in some areas and the strong demand by large grain institutions and private traders replenishing their stocks, provided further upward pressure on prices.

Food insecurity worsens significantly

According to the November 2020 "Cadre Harmonisé" analysis, the aggregate number of severely food insecure people (Phase 3: "Crisis" and above) is estimated at a record 16.7 million, up from 7.3 million estimated in November 2019. If appropriate measures are not implemented, this number is projected to increase to 23.6 million during the next lean season between June and August 2021, well above the 14.4 million estimated for the same period of 2020.

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



Source: Afrique Verte.

According to the latest estimates that refer to the period between October 2020 and May 2021, urgent food assistance is needed for 9.2 million people in **Nigeria**, 1.2 million in **the Niger,** 2 million in **Burkina Faso**, 850 000 in **Sierra Leone** and 430 000 in **Mali**. The sharp increase is mainly due to the economic slowdown caused by the COVID-19 pandemic, which also supported high inflation rates and depreciations of national currencies in **Nigeria**, **Liberia** and **Sierra Leone**. Substantial localized production deficits due to adverse weather events in several areas, coupled with the protracted conflict, have increased the prevalence and severity of food insecurity and acute malnutrition.

The combination of these factors has severely weakened the livelihoods of the most vulnerable households, especially the internal displaced populations and host communities who are heavily dependent on external food assistance.

In **Burkina Faso**, **Mali** and **the Niger**, incursions by armed groups continued to cause population displacements with widespread disruption to agricultural and marketing activities, adversely constraining the availability and access to food. This has further worsened food insecurity of households that heavily depend on humanitarian assistance to satisfy their basic needs. In addition, heavy rains resulted in localized flooding during the 2020 cropping season, causing human casualties, loss of livelihoods and damage to crops and livestock in all regions. According to UNOCHA, over 1.5 million people are internally displaced in the Liptako-Gourma Region (Burkina Faso, Mali, the Niger), while about 173 748 people reside as refugees as of January 2021. In **Nigeria**, banditry, kidnapping and communal conflict increased in recent months in the northeast, northwest and central states. The most affected households are unable to carry out their seasonal livelihood activities, which restricts income-generating opportunities. In the most inaccessible areas, the worst affected households continue to rely on markets for food with limited income opportunities, exposing them to high levels of food insecurity and acute malnutrition. According to the latest FAO/WFP early warning analysis of acute food insecurity hotspots, most households in the northeast are exposed to the high risk of famine in the event of continued heightening levels of insecurity, which could heavily constrain humanitarian access. In **Sierra Leone**, households' access to food has been severely constrained by the escalating food prices, high unemployment levels and the impacts of COVID-19 pandemic restrictive measures. The number of people in need of livelihood and external food assistance escalated significantly since 2019 and throughout 2020. The largest food insecure populations are located in the coastal districts of Bonthe and Moyamba, and the eastern district of Kenema, will need urgent assistance.

CENTRAL AFRICA

Unfavourable production prospects for the 2021 crops

Planting of the 2021 main season maize crop began in March in **Cameroon** and in **the Central African Republic,** and the harvest is expected to take place from July. Sowing of the 2021 minor season maize crop, to be harvested from May, is underway in the bi-modal rainfall areas of **the Republic of the Congo**, **Gabon** and in the northern provinces of **the Democratic Republic of the Congo**. In the southernmost uni-modal rainfall areas of **the Democratic Republic of the Congo**, planting of maize crops, to be harvested from May, finalized in January. Weather conditions have been overall favourable since December over most croplands, except in the southern Lualaba Province, where crops have been affected by reduced rainfall.

Ongoing conflicts and displacements, coupled with restrictive measures related to the COVID-19 pandemic are expected to continue to affect agricultural activities and limit farmers' access to crop-growing areas and inputs. In particular, in **the Central African Republic,** the increased violence and insecurity connected to the December 2020 elections have caused additional displacements and further diminished production prospects in 2021.

Reduced subregional cereal output in 2020

Harvesting of the 2020 cereal crops concluded in January 2021 and the aggregate subregional cereal output is estimated to have fallen slightly to a near-average level. The low output is due to the impacts of persisting conflicts, displacements and floods, coupled with the effects of the COVID-19 pandemic, which restricted farmers' access to crop-growing areas and agricultural inputs.

Prices of imported staple foods up on year-earlier levels

In **the Central African Republic**, prices of domestically produced maize and cassava decreased seasonally in November, after a period of relative stability. Since mid-December, the renewed activity of armed groups and the closure of border points with Cameroon negatively affected the supply of imported products and disrupted the internal flow of goods between production areas and urban centres. As a result, food prices in January 2021 were well above their values a year before, especially in the capital, where maize and cassava prices were about 30 percent higher year on year. In **Cameroon**, in late 2020, prices of imported rice in urban areas remained well above their year-earlier levels following sharp increases in May 2020. In the Northwest and Southwest regions, staple food prices, which were stable or declined at harvest time between September and November 2020, increased in December due to heightened demand by farming households whose stocks were depleted earlier than normal on account of a small harvest. Prices of maize, beans and potatoes increased by about 15 percent between November and December, particularly in urban centres, and were at above-average levels at the end of the year. In the Far North Region, prices of most staple food commodities seasonally declined in late 2020. However, sorghum prices in January 2021 were well above their year-earlier levels due to low domestic supplies.

About 24.2 million people estimated to be severely food insecure in early 2021

In the first quarter of 2021, the aggregate number of severely food insecure people is estimated at 24.2 million, 45 percent higher year on year. Conflicts continued to cause population displacements, resulting in the widespread disruption of agricultural and marketing activities that severely affected 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 losses and, coupled with the high level of prices, reduced households' purchasing power substantially.

In **the Central African Republic**, armed violence that ensued since the mobilization of six armed groups against the 27 December 2020 elections resulted in the displacement of over 240 000 people.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
Central Africa	5.6	5.7	5.6	1.6	1.8	1.6	7.1	7.4	7.2	-3.2
Cameroon	3.2	3.3	3.2	0.3	0.4	0.4	3.5	3.6	3.5	-2.0
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.2	0.1	-13.0
Democratic Republic of the Congo	2.2	2.2	2.2	1.2	1.4	1.2	3.4	3.6	3.4	-4.1

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

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

By early February 2021, over 117 000 people remained internally displaced and an additional 105 000 people had fled the country, mostly to the Democratic Republic of the Congo. The number of severely food insecure people is estimated at about 1.9 million (41 percent of the total population) in the period between September 2020 and April 2021, based on the latest IPC analysis from October 2020. As a result of the worsening insecurity situation since the December elections, the number of food insecure people is likely to be higher than the current estimates indicate. In **the Democratic Republic of the Congo**, according to the latest IPC analysis, published in September 2020, 19.6 million people were projected to be severely food insecure in the first half of 2021, 10 percent below the estimate for the July-December 2020 period. The decline is mainly attributable to a modest recovery in economic activities and the improved food availability during this period of the year. However, food supplies in parts of Kasai, Ituri, North Kivu, South Kivu, Tanganyika and Maniema provinces may have been exhausted earlier than usual due to the effects of floods, insecurity and population displacements on food production. Despite the overall improvement, the food security situation remains dire, with 29 percent of the analyzed population estimated to be severely food insecure (IPC Phase 3 or above). In addition, fighting in neighbouring Central African Republic resulted in an influx of about 92 000 refugees into the northern provinces of North Ubangi, South Ubangi and Bas Uele in early 2021. In **Cameroon**, according to the October 2020 "Cadre Harmonisé" analysis, about 2.7 million people (10 percent of the population) were estimated to be severely food insecure (CH Phase 3 or above) in the October-December 2020 period, well above the previous year's level. This mainly results from the impacts of Boko Haram incursions in the Far North Region, socio-political unrest in the Northwest and Southwest regions, flooding and COVID-19-related economic shocks, which disrupted cross border trade and agricultural practices, deteriorated livelihoods and displaced people. About 35 percent of the severely food insecure people were hosted in the Northwest and Southwest regions, and 30 percent in the Far North Region, where the number of incursions by Boko Haram increased by 55 percent in 2020 compared to the previous year and triggered new population displacements.

EAST AFRICA

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

Harvesting of the 2020 secondary season cereal crops was recently concluded in **Uganda**, southern **South Sudan**, northeastern **United Republic of Tanzania** ("Vuli"), **Somalia** ("Deyr") and in marginal and coastal agricultural areas of southeastern **Kenya** ("short-rains").

The October-December 2020 seasonal rains were abundant over **Uganda**, southern **South Sudan** and **the United Republic of Tanzania**, benefiting crop development and, despite localized losses due to

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
East Africa	5.8	6.3	6.1	44.5	46.4	46.9	54.1	56.8	58.4	2.9
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	9.1
Sudan	0.6	0.7	0.7	6.1	6.4	6.9	6.8	7.1	7.6	6.5
Uganda	0.0	0.0	0.0	3.3	3.2	3.4	3.5	3.5	3.6	4.3
United Republic of Tanzania	0.1	0.1	0.1	7.2	6.8	7.4	10.3	9.9	12.0	21.0

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).

floods, cereal production is estimated at above-average levels. By contrast, in southeastern and coastal areas of **Kenya**, rains were erratic and seasonal totals below average, pushing the cereal harvest 30 percent below the five-year average. In key cropping areas of southern **Somalia**, a prolonged dry spell in October 2020 affected crop establishment and vegetation conditions. Subsequently, torrential rains in the first half of November benefited crops, but also resulted in losses due to floods. In addition, desert locust infestations, which had previously been confined to northern and central pastoral regions, attacked cowpea and sorghum crops in Hiraan, Middle Shabelle, Galgaduud and Mudug regions. As a result of the effects of pests and adverse weather conditions, cereal production is estimated to be 7 percent below the five-year average. In **South Sudan**, according to the preliminary findings of the 2020 FAO/WFP Crop and Food Security Assessment Mission, the 2020 aggregate cereal production is estimated at about 874 400 tonnes, 7 percent above the 2019 average output, but still well below the pre-conflict levels. Cereal production benefitted from an increase in the planted area due to security improvements and increased availability of family labour following the closure of schools on account of the COVID-19 pandemic. Abundant and well-distributed rains over most cropping areas boosted yields, but also triggered widespread floods for the second consecutive year, resulting in significant crop losses, especially in Jonglei, Lakes and Upper Nile states.

The 2020 subregional cereal output is estimated at 58.4 million tonnes, 8 percent above the average of the previous five years, mainly on account of above-average first/main season harvests resulting from abundant and well-distributed precipitation.

The distribution of October-December 2020 rains was also erratic and seasonal totals were below average in several pastoral areas of northern and eastern **Kenya**, southeastern **Ethiopia** and central and northern **Somalia**, resulting in an inadequate regeneration of rangeland resources. These areas have also been affected by severe locust outbreaks since late 2019, however, insect numbers declined during most of 2020 due to sustained control operations. In late 2020 and early 2021, infestation levels increased again due to winter breeding along the Red Sea coasts, especially in Yemen, and on account of Cyclone Gati that hit northeastern Somalia in late November and created conducive conditions for locust reproduction. The combined effect of locusts and poor seasonal rains led to a fast depletion of rangeland resources that will affect livestock conditions until the end of the dry season in March 2021.

Land preparation is underway for 2021 main season crops

Land preparation for the 2021 main season cereal crops started in the major growing areas of Central, Rift Valley and Western provinces in **Kenya** ("long-rains" season), in southern and central Somalia ("Gu" season) and in southern bi-modal rainfall areas of **South Sudan** and **Uganda**. In **Ethiopia**, planting of secondary "Belg" season crops, for harvest from May, is currently underway in eastern Amhara, eastern Oromia, southern Tigray and northeastern SNNP regions. In the conflict-affected Tigray Region, planting operations are likely to be affected by insecurity and input shortages due to market disruptions. In central and southern uni-modal rainfall areas of **the United Republic of Tanzania**, planting of the 2021 "Msimu" crops, to be harvested in May/June, was completed in December 2020. Abundant precipitation between November 2020 and early February 2021 benefited crop development. However, the heavy rains triggered floods in southern Mtwara Region, which are likely to result in localized shortfalls in cereal production. In **Rwanda** and **Burundi**, harvesting of the "2021A" season crops was delayed by about one month, concluding in February, due to a late onset of the September-November 2020 rains. Abundant rains during the season offset the early moisture deficits in most areas and crop production is estimated at an above-average level in both countries. However, the late harvest of the "2021A" season crops delayed land preparation and planting for the "2021B" season, increasing the risk of crops not reaching full maturity before the cessation of the March-May seasonal rains.

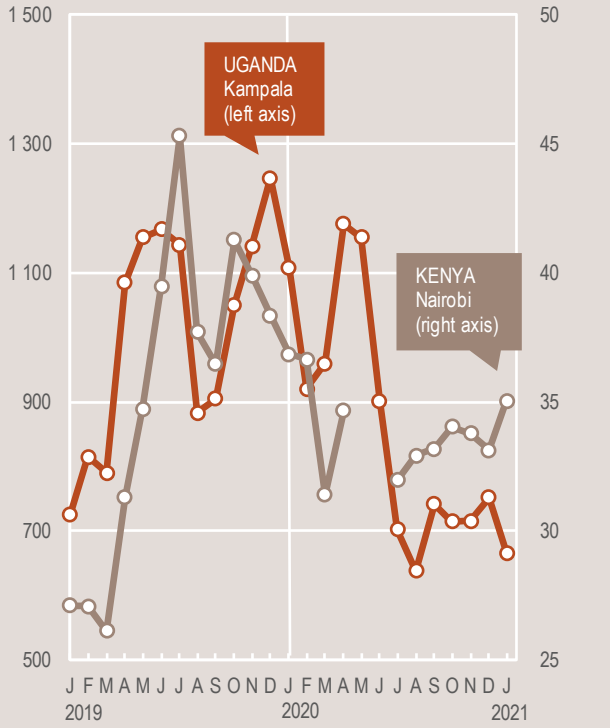
According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the March-May 2020 rainy season will be characterized by above average precipitation over eastern South Sudan, northeastern Uganda, western Kenya, central United Republic of Tanzania and northern Somalia. Rains are expected at below-average levels over northern and eastern Ethiopia and in areas of western South Sudan, while average amounts of precipitation are expected over the rest of the subregion.

Cereal prices at high levels in the Sudan and South Sudan

In **the Sudan**, prices of locally grown sorghum and millet declined by 5-10 percent in January 2021 from the record highs reached in December with the commercialization of the 2020 crops. However, prices remained extremely high, up to three times the elevated year-earlier levels, mainly due to sustained currency weakness and the soaring prices of agricultural inputs that drove up production costs. In **South Sudan**, prices of maize and sorghum in the capital, Juba, increased rapidly by more than 60 percent in October, on account of a steep depreciation of the currency in the parallel market. In the following three months, prices increased only moderately as the second season harvest increased market availabilities, but by January 2021 they remained more than three times higher on a yearly basis. Factors contributing to the exceptionally high prices include the difficult macro-economic situation, inadequate domestic supplies, the lingering effects of the conflict and the introduction of COVID-19 screening measures at border points in Uganda, the country's main source of imported cereals, which hampered trade flows. In **Uganda**, prices of maize declined seasonally by 10-25 percent in January 2021 as the newly harvested 2020 second season crops increased market availabilities. Prices in January were 40-45 percent below their year-earlier levels, mainly due to the implementation of measures to contain the spread of the COVID-19 virus that also weighed down demand from urban households, schools, restaurants and hotels. In **Ethiopia**, prices of wheat and sorghum declined in the capital, Addis Ababa, by 5-10 percent between September and November 2020 with the main "Meher" harvest increasing supplies, while prices of teff remained firm and prices of maize increased by 8 percent over the same period. Prices of all cereals in November 2020 were up to 40 percent above their year-earlier levels, underpinned by the weak domestic currency that increased transportation and production costs. In the Tigray Region, the ongoing conflict has resulted in widespread shortages of food commodities and in sharp price increases. In the regional capital, Mekele, between November and December 2020, prices of several key staples increased by 50-100 percent. In **Kenya**, prices of maize remained stable or increased moderately in January due to the unfavourable production prospects for the imminent secondary "short-rains" harvest. However, prices remained up to 30 percent below their year-earlier values on account of adequate domestic availabilities. In **Somalia**, prices of sorghum and maize increased seasonally by 5-10 percent in December 2020 in the key southern producing areas and in the capital, Mogadishu, and remained around their year-earlier levels.

Maize prices in selected East African markets

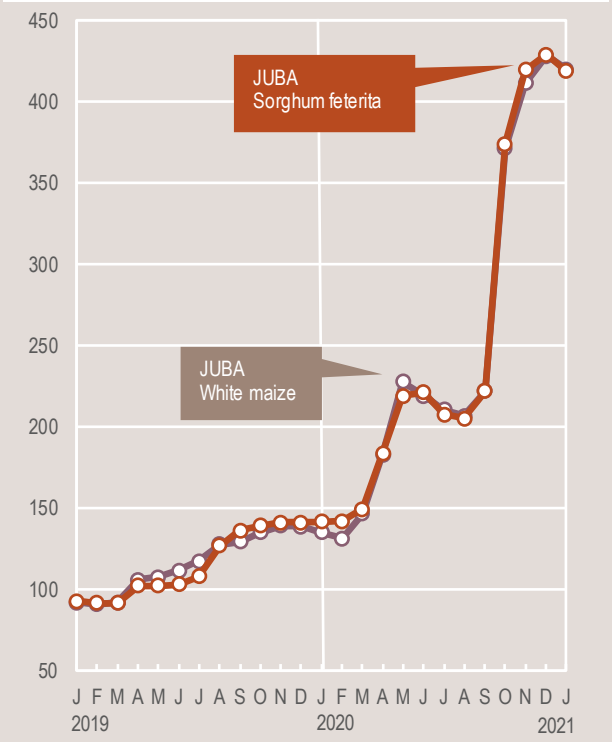
(Uganda Shilling/kg) (Kenya Shillin/kg)



Sources : Regional Agricultural Trade Intelligence Network.

Retail prices of maize and sorghum in South Sudan

(South Sudanese Pound/kg)



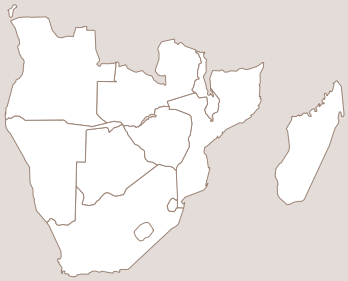
Source : Crop and Livestock Market Information System (CLIMIS).

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

The aggregate number of people in need of humanitarian assistance in the subregion is estimated at 33 million, and are mainly located in **Ethiopia**, **South Sudan** and **the Sudan**. This number is more than 20 percent higher on a yearly basis and well above the high levels of food insecurity recorded during the 2016 and 2017 droughts. The current food security situation has been 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 pandemic have hindered livelihood activities, impaired domestic and cross-border trade of food commodities, resulting in reduced market availabilities and higher food prices. In addition, the restrictions diminished labour opportunities and consequently reduced incomes, especially in urban areas, constraining households' purchasing power. The global economic slowdown has also caused a sharp decline in remittances, while reduced sales and exports of livestock due to depressed demand in importing countries have

weighed on the incomes of pastoralist households. In **Ethiopia**, according to the latest Integrated Food Security Classification (IPC) analysis, about 12.9 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between January and June 2021. They are mainly located in SNNP, Eastern Oromia and Somali regions. In addition, humanitarian needs have increased sharply in Tigray Region after the conflict erupted in November 2020, which resulted in population displacements, livelihood losses, market disruptions and soaring food prices. In **South Sudan**, about 5.8 million people (about 48 percent of the total population) are estimated to face Phase 3: "Crisis" or worse levels of acute food insecurity between December 2020 and March 2021. Particular concern exists for households in Jonglei State and the neighbouring Pibor Administrative Area, where almost 80 percent of the population is estimated to be severely food insecure and 11 000 people are facing IPC Phase 5: "Catastrophe" levels. In **the Sudan**, 7.1 million people were estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") during the last quarter of 2020. The alarming food insecurity situation is mainly due to flood-induced livelihood losses, soaring food prices and the impacts of the COVID-19 pandemic. In **Uganda**, according to the latest IPC analysis, conducted in urban areas, refugee settlements, host communities and the Karamoja Region, about 2 million people were estimated to be severely food insecure (IPC Phase 3: "Crisis" and Phase 4: "Emergency") in the period September 2020-January 2021. In urban areas, over 600 000 people were estimated to be food insecure due to the effects of the COVID−19 pandemic on incomes of poor households, who mainly rely on daily wage labour. In **Kenya**, the number of food insecure people declined in rural areas from 3.1 million in late 2019 to about 852 000 in late 2020 due an increase in crop and livestock production. By contrast, the food security situation significantly deteriorated in urban areas, where about 1 million people were estimated to be food insecure between October and December 2020, as a result of the impact of the COVID-19 pandemic. In **Somalia**, 1.6 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between January and March 2021, mainly due to the effects of locust infestations, the impact of the COVID-19 pandemic and weather extremes, including floods in southern areas, dry conditions in most central and northern areas, and Cyclone Gati.

SOUTHERN AFRICA



Overall favourable production prospects in 2021, but abnormal dryness and cyclones likely to cause localized shortfalls

Harvesting of the 2021 cereal crops is expected to begin from late March and, owing to generally beneficial weather conditions, the aggregate output is forecast to remain at an above-average level for a second consecutive year. There are, however, concerns for crops in southern regions of Angola and Madagascar as well as in northern parts of Mozambique, where substantial rainfall deficits have been recorded since the start of the season and will likely result in below-average cereal yields, curtailing national outputs. The effects of the COVID-19 pandemic have also constrained access to agricultural inputs for many farming households, which is likely to have adversely affected the area planted and could limit yields.

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
Southern Africa	2.0	1.8	2.5	25.1	23.9	30.8	4.1	4.4	4.5	31.2	30.1	37.8	25.8
excl. South Africa	0.3	0.2	0.4	12.4	11.5	14.0	4.1	4.4	4.5	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	2.1	12.8	12.3	16.7	0.0	0.0	0.0	14.4	13.9	18.9	36.1
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	32.4

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

In **South Africa**, the main cereal producer in the subregion, production of maize is forecast at an above-average level of around 16 million tonnes in 2021. The favourable harvest expectations rest on an expansion in the area planted, underpinned by remunerative grain prices, and conducive weather conditions that are expected to sustain above-average yields. Outputs of the other summer cereal crops, including sorghum, are also expected at above-average levels in 2021. Equally favourable weather conditions prevailed in **Malawi** and **Zambia**, where remote sensing vegetation indexes at the end of February indicated healthy crop conditions, portending to above-average cereal yields. Crop conditions in **Zimbabwe** are also mostly positive and far superior compared to the previous two years, when abnormal dryness resulted in sharply reduced outputs. Cereal production in 2021 is therefore expected to recover, driven mostly by an upturn in crop productivity. The production outlooks for **Botswana**, **Eswatini**, **Lesotho** and **Namibia**, countries that import a large share of their cereal needs, are similarly favourable owing to a beneficial distribution of rains and, consequently, average to above-average harvests are expected to be attained. By contrast, adverse weather conditions have affected parts of **Angola**, **Madagascar** and **Mozambique**, mostly relating to poor rains that caused cereal acreage reductions and resulted in soil moisture deficits, curbing yield prospects. Additionally, cyclones and tropical storms have traversed both Madagascar and Mozambique, resulting in localized floods and crop damage. A further risk to cereal production across all countries is the infestations of African migratory locusts and red locust hoppers as abundant seasonal rains have provided ideal breeding conditions and also hampered control operations.

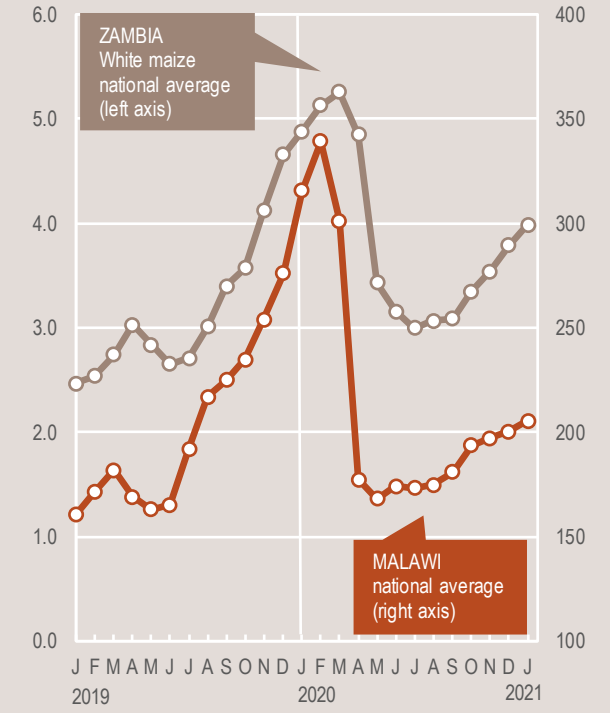
Large harvests curbed import needs and boosted export availabilities

As cereal production recovered in 2020 compared to the previous year, the subregional import requirements are estimated to have declined in the 2020/21 marketing year (generally April/March). The bulk of the decrease reflects reduced import needs in **South Africa**, as the 2020 national cereal output was the second highest level on record and sufficient to cover almost all consumption needs, except for rice and wheat. Reduced import requirements are also estimated in **Namibia**, while in most of the remaining countries of the subregion import needs grew in 2020/21 but less than in previous years due to the large domestic harvests. By contrast, import requirements in **Zimbabwe** remained at exceptionally high levels due to a second consecutive well below-average harvest and low national stocks.

Reflecting the production upturns in **South Africa** and **Zambia** in 2020, the two main exporting countries, exportable maize supplies are expected to be adequate to cover the bulk of the import requirements in the subregion. Approximately 2 million tonnes have already been exported by **South Africa** as of January 2021, half of this quantity was exported to neighbouring countries and the other half was exported to East Asian countries. Exports from **Zambia** were substantially lower in comparison, but the country had exported almost twice the quantity in 2020/21 compared to the previous year. Formal trade in cereals was exempted from the restrictive measures introduced to contain the COVID-19 pandemic and minimal disruptions were reported. However, the containment policies have affected informal trade and the overall pace of imports in 2020/21 slowed, likely resulting in supply shortages in some border regions.

Maize prices in selected Southern African markets

(Zambia New Kwacha/kg) (Malawi Kwacha/kg)



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

Ample cereal supplies tempered price rises, but weak currencies exert inflationary pressure

The ample national cereal supplies have generally limited seasonal price increases since the last quarter of 2020 and in some countries kept prices at lower levels on a yearly basis. This is the case for **Malawi** and **Zambia**, where the national average maize grain prices were 35 and 18 percent, respectively, below their year-earlier levels as of January 2021. In **Mozambique**, prices of maize have risen at generally steep rates in the last quarter of 2020, partly driven by a weakening currency, which had lost about 20 percent of its value against the US dollar in the 12 months to January 2021. In **South Africa**, following two months of declines, wholesale prices of maize grain increased in January 2021 and were more than 20 percent above their year-earlier levels. The recent uptick and overall higher prices were underpinned by spillover effects from the international market, where prices have risen sharply reflecting increasingly tight global supplies, and a depreciation of the national currency. In the import-dependent countries, **Botswana**, **Eswatini** and **Namibia**, which source the bulk of their grain supplies from South Africa, prices of maize meal were mostly stable in the last quarter of 2020, but higher than the previous year amid increasing import costs. In **Zimbabwe**, prices of most food commodities continued to increase in January 2021 albeit at a significantly slower pace compared to the steep rates registered in mid-2020. The slower monthly rises are partly attributed to a more stable exchange rate since the last quarter of 2020. However, despite the recent slowdown, food prices had increased by 370 percent over the preceding 12 months, driven by an overall weak currency and tight domestic supplies.

COVID-19 and conflict aggravate food insecurity

The number of food insecure people in the subregion, incorporating a new estimate for South Africa following a first IPC analysis, is estimated at 24 million in the January-March 2021 period. Compared to the same period in 2020, the prevalence of food insecurity has increased in most countries driven primarily by the effects of the COVID-19 pandemic and associated lockdown measures that disrupted economic activities. The foremost effect of the pandemic on households' food security conditions has been the loss of jobs and incomes, which resulted in a reduction of households' capacity to purchase food. In addition to the COVID-19 pandemic, the conflict in northern **Mozambique** has severely disrupted livelihoods and resulted in a high prevalence and severity of food insecurity, especially in the province of Cabo Delgado. The conflict has caused the displacement of more than 565 000 people as of January 2021.

Looking further ahead, food availability is not foreseen to be a significant impediment in most countries, particularly with an expected above-average harvest this year. However, the slow economic recovery, with growth prospects tempered by the recent reintroduction of lockdown measures aiming to control a second wave of COVID-19 infections, will continue to constrain households' access to food. Furthermore, the high levels of food insecurity are expected to persist in southern parts of Madagascar and Angola due to the impact of rainfall deficits on agricultural production in 2021 as well as in northern Mozambique due to both the impact of the conflict and poor weather conditions.

REGIONAL REVIEWS
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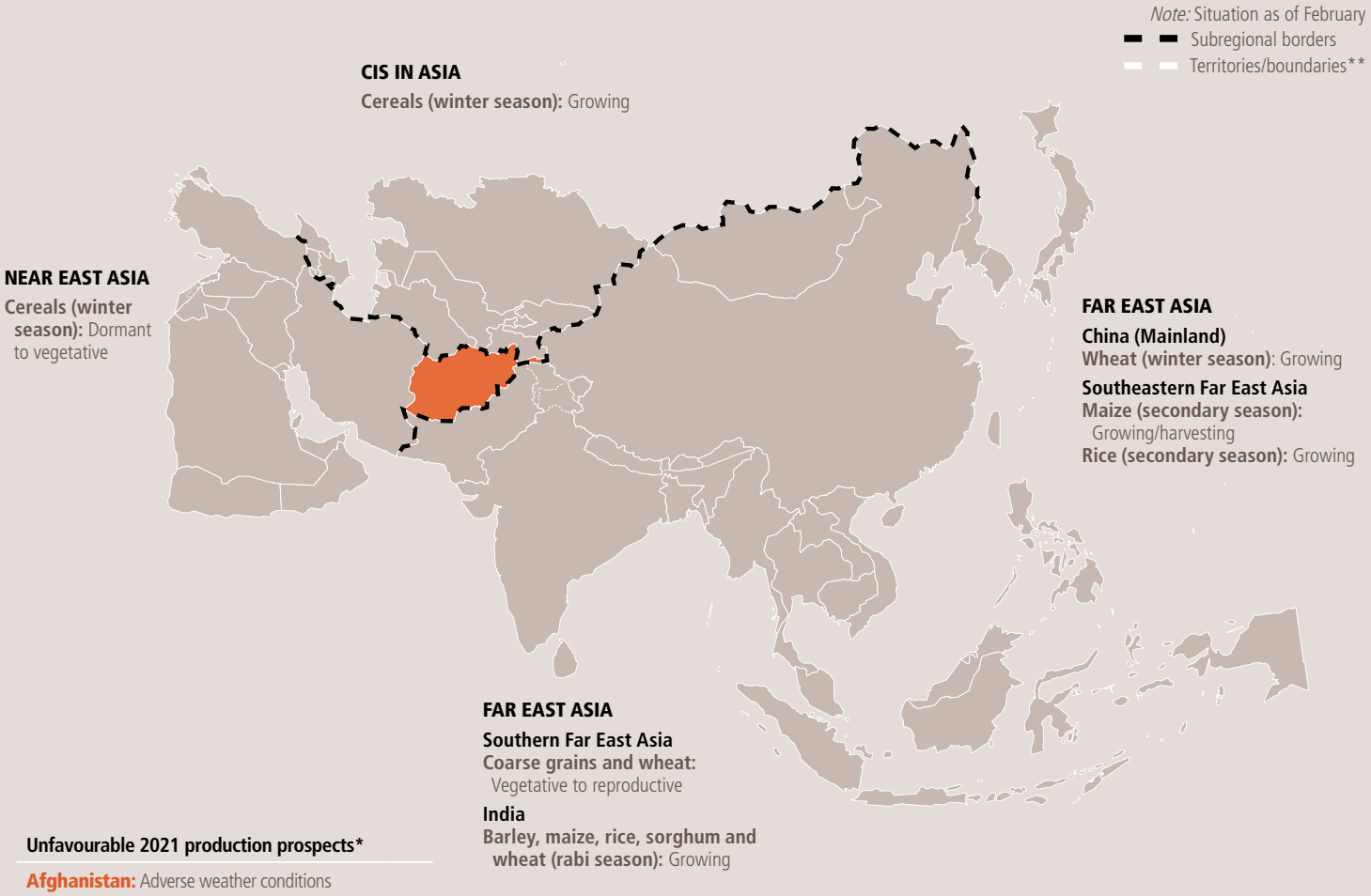


*/** See Terminology (*page 6*).
Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

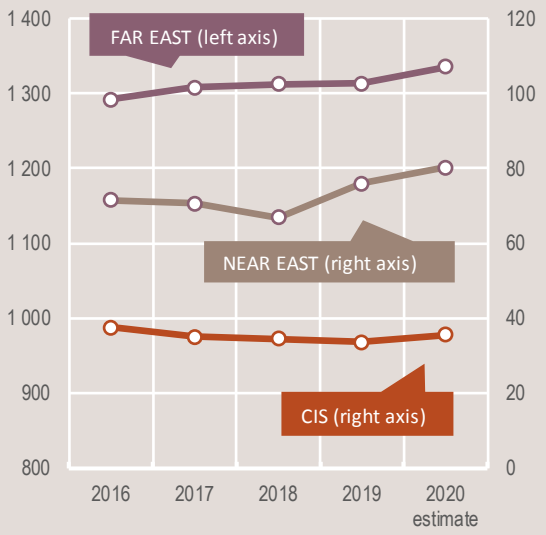
Source: GIEWS, 2021. Conforms to the United Nations map No. 4140 Rev. 4, 2011.

Asia Production Overview

The aggregate cereal output in Asia in 2020 is forecast at 1 448 million tonnes, well above the previous year's outturn and the five-year average. The bulk of the expected production upturn stems from larger outputs in Far East Asian countries, notably bumper paddy and wheat harvests in India and Pakistan. Cereal outputs in Near East Asian countries were estimated at higher year-on-year levels and generally exceeded the five-year averages, while in CIS Asia production remained mostly unchanged in 2020.

The 2021 wheat crops are to be harvested from the second quarter of the year and production prospects in 2021 are mostly favourable in Far East Asia, with the main producers of the subregion reporting higher plantings and conducive weather conditions that portend to good yields. Mostly favourable weather conditions are also supporting positive production outlooks in CIS Asian countries. By contrast, concerns remain for wheat production in Near East Asian countries due to dry weather conditions.

Cereal production
(million tonnes)



FAR EAST

Above-average wheat production expected in 2021

Harvesting of the 2021 wheat crop, which is predominantly produced under irrigation, is expected to start in April. Overall, the total area planted in the subregion is estimated to be above the five-year average, sustained by strong domestic demand and high prices in several countries. Precipitation amounts since September 2020 have been average to above average over the main producing areas, replenishing soil moisture and creating conductive conditions for planting activities and crop development. Supplies of agricultural inputs, such as irrigation water, fertilizers and pesticide, were also reported to be adequate and, together with the increased use of hybrid seeds varieties, have boosted yield prospects in most countries. In **China (mainland)**, field assessments indicate near-average growing conditions of the 2021 winter wheat crop, which has recently broken dormancy in northern parts of the country, while it is already at tillering to jointing stages of development in the eastern and central parts. The aggregate area planted with wheat, including a forecast for the minor spring crop to be planted in April, is set at a near-average level of 23.8 million hectares. In **India**, the 2021 area planted to wheat is officially estimated at a record 34.6 million hectares, mostly supported by remunerative producer prices guaranteed by the Government. In **Pakistan**, record domestic prices and government programmes promoting wheat production, prompted farmers to increase the area planted, which is estimated at an above-average level of 9.2 million hectares.

Above-average aggregate cereal production forecast for 2020

The 2020 subregional aggregate cereal output is forecast at 1 333 million tonnes (rice in paddy equivalent), slightly above the previous five-year average. The good output reflects a bumper 2020 main season harvest and a positive outlook for the 2020 secondary crops, which are soon to be harvested in Northern Hemisphere countries.

The 2020 aggregate production of paddy rice, the major staple in the subregion, is forecast at a bumper level of 680.5 million tonnes, slightly above the five-year average. This production expectation reflects an increase in area planted, supported by remunerative domestic prices and continued government support. Overall, yields are forecast above the five-year average as weather conditions were generally favourable, even though crop damages were caused by floods in **Bangladesh**, **China (mainland)**, **the Democratic People's Republic of Korea**, **India**, **Nepal** and **Pakistan**. In **China (mainland)**, the world's largest rice producer, the 2020 paddy output is estimated at 211.9 million tonnes, up marginally from 2019, aided by the decision by the Government to increase the purchase price for the Indica rice variety. In **India**, the 2020 aggregate paddy output is forecast at a record high of 182.2 million tonnes, reflecting large plantings supported by abundant rains and support programmes from the Government. Similarly, record or near-record outputs are estimated for **Nepal**, **Pakistan**, **the Philippines** and **Sri Lanka**. In **Bangladesh**, the 2020 aggregate paddy production is estimated to have remained stagnant at 54.9 million tonnes, slightly above the five-year average, as bumper "Boro" and "Aus" harvests offset the "Aman" crop losses caused by flash floods in July and August 2020.

By contrast, below-average outputs are forecast in **Indonesia**, due to a weather-reduced area of the main harvest, and in **Thailand**, owing to a reduction in plantings of the secondary season crop caused by a limited supply of irrigation water. Similarly, a below-average output is expected in **Viet Nam**, reflecting a combination of dry weather conditions and saltwater intrusion in the southern main producing areas.

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
Far East	259.2	266.4	272.0	373.2	375.9	380.8	667.9	671.2	682.8	1 300.3	1 313.5	1 335.5	1.7
Bangladesh	1.2	1.0	1.0	2.9	3.6	3.9	53.2	54.8	54.8	57.4	59.4	59.8	0.7
Cambodia	0.0	0.0	0.0	0.9	0.9	0.9	10.3	10.9	11.0	11.2	11.8	11.9	0.9
China (mainland)	133.1	133.6	134.2	270.2	269.9	269.9	211.5	209.6	211.9	614.8	613.1	616.0	0.5
India	96.2	103.6	107.6	43.9	44.0	47.3	168.7	178.3	184.5	308.7	325.9	339.4	4.2
Japan	0.9	1.0	1.0	0.2	0.3	0.2	10.8	10.5	10.5	11.9	11.8	11.8	-0.5
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	5.6	9.9	10.8	10.9	1.1
Pakistan	25.4	24.4	25.3	6.6	7.2	7.5	10.7	11.1	12.3	42.7	42.7	45.0	5.5
Philippines	0.0	0.0	0.0	7.7	8.0	8.1	18.6	18.9	19.7	26.3	26.9	27.8	3.4
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	13.5
Thailand	0.0	0.0	0.0	4.9	4.5	5.2	30.6	28.3	29.4	35.4	32.8	34.5	5.4
Viet Nam	0.0	0.0	0.0	5.1	4.8	4.6	43.7	43.5	42.7	48.8	48.3	47.3	-2.0

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

The 2020 aggregate maize production is forecast at 350.6 million tonnes, close to last year's high level. The subregional 2020 aggregate wheat production, harvested in the first half of 2020, is estimated at a record level of 272.2 million tonnes.

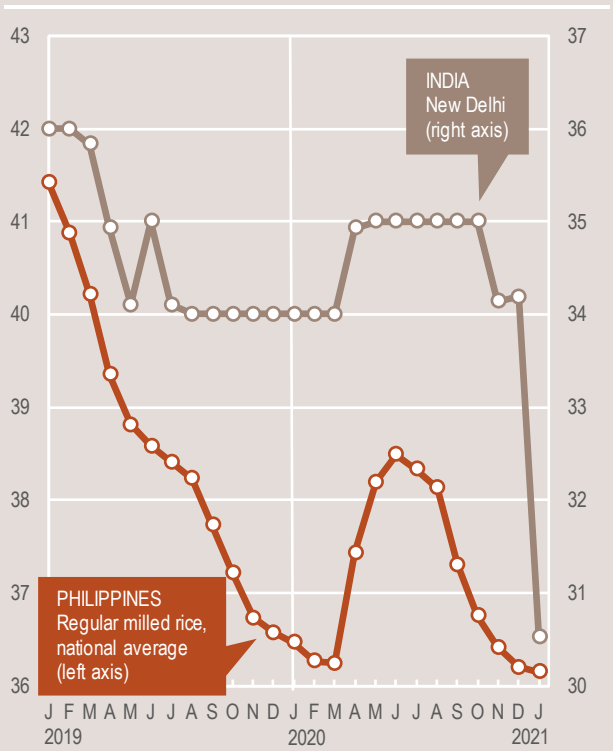
Aggregate cereal imports forecast at a record level in 2020

The total cereal import requirements in the subregion in 2020/21 are forecast at a record level of 158.7 million tonnes (rice in milled terms), about 20 percent above the five-year average. The increase is mainly due to the robust demand of feed crops in **China (mainland)** on account of the recovery in domestic pork production following the outbreak of the African Swine Fever (ASF) in 2018 and 2019, as well as due to the strong growth in the poultry, diary and starch sectors. The increased demand caused a surge in domestic maize prices, which encouraged an upbeat pace of import orders for cheaper maize imports. Consequently, imports of maize by China (mainland) are forecast at a record high of 20 million tonnes in the 2020/21 marketing year (October/September), almost five times the average level. Similarly, the subregional aggregate wheat import requirement in 2020/21 is estimated at 55.4 million tonnes, the highest level since 2016/17, underpinned by a growing demand for both food and feed quality wheat. The largest increase is expected in China (mainland), but large importers such as **Bangladesh**, **Indonesia**, **Japan**, **the Republic of Korea**, **the Philippines** and **Viet Nam** are also expected to increase wheat purchases from the international market. In **Pakistan**, wheat import requirements are estimated at 2.8 million tonnes, the largest volume since 2008/09, as the Government and traders seek to improve domestic availabilities amid record or near-record domestic prices. Imports of rice in the 2021 calendar year are forecast at 12.9 million tonnes, up 15 percent from 2020. Aggregate rice exports in the 2021 calendar year are forecast at 40.4 million tonnes, with an increase of 11 percent compared to the previous year's level. This is the result of higher-than-expected exports in **Cambodia**, **China (mainland)**, **India**, **Pakistan** and **Thailand**.

Domestic prices of rice at high levels in most countries of the subregion

Domestic prices of rice were stable or increased between November 2020 and January 2021 and were generally well above their year-earlier levels, especially in traditional rice exporting countries. The strongest price increases were registered in **Thailand**, mostly supported by unfavourable production prospects for the 2020 secondary crop. In **Viet Nam**, prices of rice strengthened for the fourth consecutive month in January 2021, reflecting seasonally tight availabilities exacerbated by concerns over the impact of low irrigation supplies and salt-water intrusion on the output of the main 2021 "winter/spring" crops to be harvested by March. Overall, prices in January were about 50 percent above their year-earlier levels. In **Myanmar**, following declines during two consecutive months, prices increased in January, on strong domestic demand. In **India**,

Rice retail prices in selected Far East countries



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

Table 12. Far East cereal production and anticipated trade in 2020/21

(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	*3 596*	*3 565*	*5 375*	*50.8*	*49.5*
Imports	*66 961*	*73 206*	*91 531*	*25.0*	*36.7*
Production	*373 170*	*375 931*	*380 768*	*1.3*	*2.0*
Rice (millled)					
Exports	*37 414*	*36 855*	*40 168*	*9.0*	*7.4*
Imports	*13 447*	*11 365*	*12 895*	*13.5*	*-4.1*
Production	*444 232*	*446 944*	*454 660*	*1.7*	*2.3*
Wheat					
Exports	*2 379*	*1 725*	*2 110*	*22.3*	*-11.3*
Imports	*51 056*	*51 693*	*56 542*	*9.4*	*10.7*
Production	*259 235*	*266 441*	*271 985*	*2.1*	*4.9*

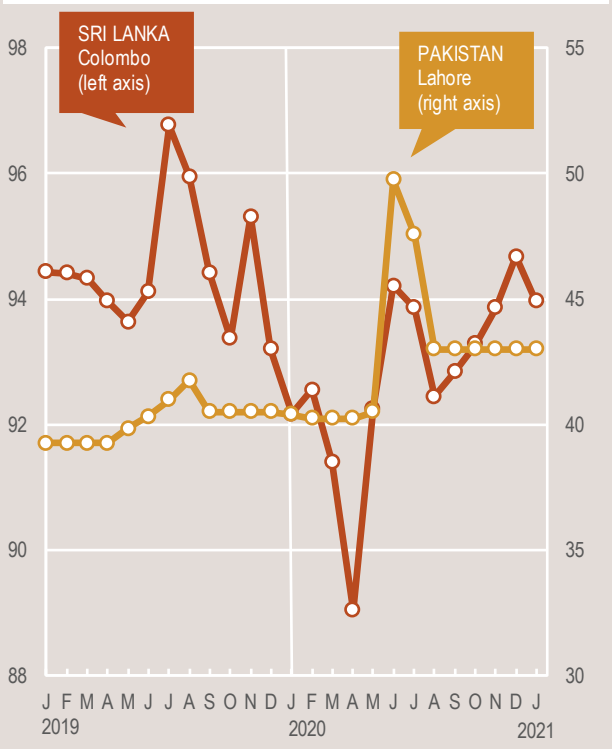
Note: Marketing year July/June for most countries. Rice trade figures are for the second year shown.

despite the arrival on markets of a record 2020 main crop, domestic rice prices have remained generally stable in the three months to January 2021, reflecting large domestic purchases by the Government and sustained export flows. Similarly, prices were stable in **Cambodia** and **China (mainland)**, reflecting adequate market availabilities. Regarding importing countries, in **Bangladesh**, prices of rice in Dhaka market continued their upward trend and, in January, they were at their highest levels since October 2017, more than 35 percent higher on a yearly basis. The persistent price increases are attributed to stagnant production, limited imports and an upsurge in domestic demand due to the COVID-19 pandemic. In **Sri Lanka**, prices increased in December and January, amid seasonal supply tightness, while they were generally stable in **the Philippines** and **Indonesia**. As for wheat and wheat flour, prices were relatively stable in most countries between November and January, with a few exceptions. In **Pakistan**, prices of wheat flour decreased in December and January from the record levels reached in November 2020, reflecting improved market availabilities from sizeable imports. Prices of wheat flour were generally stable both in **India** due to adequate market availabilities, and in **Bangladesh** and **Sri Lanka,** due to adequate imports.

Effects of COVID-19 pandemic worsen food insecurity

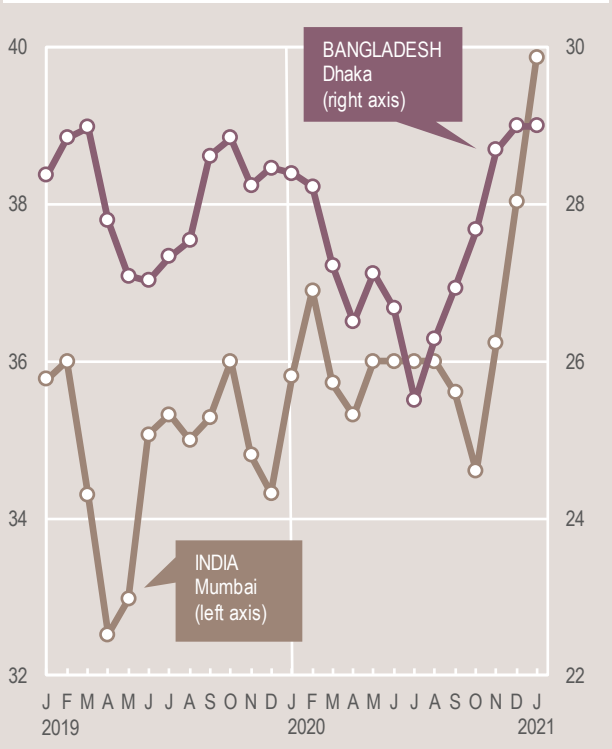
Food insecurity is worsening mainly due to income losses and the reduction in remittances associated with the COVID-19 pandemic and its containment measures. In **Bangladesh,** despite the Government's expansion of social protection provisions, official estimates indicate that, as of June 2020, 30 percent of the total population was poor, compared to 21 percent in June 2019. In Nepal, UNICEF's estimates indicate that the COVID-19 pandemic has seriously affected child poverty, with the number of children living in poverty estimated to have increased to 7 million as of August 2020, up from 1.3 million before the pandemic. In addition, monsoon floods and landslides in **Bangladesh**, **China (mainland)**, **the Democratic People's Republic of Korea**, **India**, **Nepal** and **Pakistan** have severely affected the livelihoods of a large number of people. Severe food insecurity persist especially among the refugees hosted in **Pakistan** and **Bangladesh**. In particular, in Bangladesh, the food security situation of about 860 000 Rohingya refugees and the host communities have severely deteriorated in 2020 compared with the pre-COVID-19 pandemic. In **the Democratic People's Republic of Korea**, it is estimated that large parts of the population continue to suffer from low levels of food consumption and very poor dietary diversity.

Wheat flour retail prices in selected Far East countries



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

Wheat flour retail prices in selected Far East countries



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

NEAR EAST

Mixed prospects for 2021 winter cereal crops

Planting of the 2021 winter grain crops, for harvest from May 2021, finished in January. In some countries, the first substantial rainfall of the season did not occur until November 2020 but provided adequate moisture for sowing. Below-average rainfall amounts in December resulted in dry conditions in many areas across the subregion, especially in **Turkey**, the most important regional producer. Rainfall resumed from mid-January onwards, reducing soil moisture deficits, albeit not uniformly across all cropping areas. As of mid-February, pockets of dry conditions remained across the **Syrian Arab Republic**, **Iraq**, and in northeastern **Islamic Republic of Iran**. In **Turkey**, widespread rains in early February improved soil moisture conditions in central areas of the country that were previously affected by drought. In **Afghanistan**, below-average precipitation prevailed throughout most of the country. Lack of snow cover makes crops susceptible to frost kill and limits the availability of irrigation water from melted snow for the summer crops, planted from February onwards.

Sustained rainfall is needed in the upcoming months across the subregion to improve and maintain crop prospects.

Weather forecasts point to above-average precipitation across most of **Turkey** and eastern parts of **Syrian Arab Republic** up to mid-March. By contrast, below-average precipitations are expected in **Iraq**, **the Islamic Republic of Iran** and, particularly, in **Afghanistan**, forecasts underpinned by La Niña meteorological phenomenon.

The preliminary forecast for wheat production in **Turkey** points to a slightly below-average output of 19 million tonnes in 2021, assuming favourable weather conditions for the remainder of the season, and a near-average production of 14 million tonnes is foreseen in **the Islamic Republic of Iran**.

The ongoing conflict and socio-economic concerns, further exacerbated by the pandemic, including currency depreciation and high transportation costs, continue to have a negative impact on agricultural activities in **the Syrian Arab Republic** and **Yemen**.

Above-average cereal output gathered in 2020

At the subregional level, the total 2020 cereal production (rice in paddy terms) is estimated at 79.3 million tonnes, almost 7 percent above the previous year and over 12 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.

The subregional cereal import requirement in the 2020/21 marketing year (July/June) is estimated at 75 million tonnes, approximately 3 percent below the previous year and almost 6 percent above the five-year average. At 30.7 million tonnes, the wheat import requirement is estimated to remain similar to the five-year average and almost 10 percent below the previous year's level.

Large number of people remain food insecure

The food insecurity of a large number of people in the subregion shows no signs of improvement compared to the previous year due to persisting conflicts, economic downturns and reduced livelihood opportunities. The COVID-19 pandemic has further amplified shocks.

In **Afghanistan**, between November 2020 and March 2021, about 13.15 million people (over two-fifths of the total population) are estimated be in severe acute food insecurity and require urgent humanitarian assistance, including 8.52 million people in IPC Phase 3: "Crisis" and 4.3 million people in IPC Phase 4: "Emergency". In comparison, 11.15 million were facing IPC Phase 3 or above between August and October 2020.

In **Yemen**, between January and June 2021, despite the delivery of humanitarian assistance, the number of food insecure people is estimated to have increased from 13.5 million to 16.2 million, including 11 million people in IPC Phase 3: "Crisis", 5 million in IPC Phase 4: "Emergency" and 47 000 people in IPC Phase 5: "Catastrophe".

In **the Syrian Arab Republic**, a nationwide food security assessment indicates that about 12.4 million people (60 percent of the overall population) are food insecure, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and a rapidly worsening economy.

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
Near East	44.5	45.7	49.1	21.8	23.7	25.1	4.9	6.6	6.0	71.2	75.9	80.2	5.7
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	3.2	4.4	3.9	21.4	23.0	22.2	-3.7
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.

CIS IN ASIA

Favourable weather conditions for dormant 2020 winter cereals

Planting of the 2021 winter cereals, to be harvested between June and September, was finalized last November and the total area planted in the subregion[3] is estimated to be near the five-year average. Weather conditions are reported to have been favourable for dormant crops, mainly wheat and barley, except in **Turkmenistan** and **Uzbekistan,** where precipitation levels have been below average since October 2020, reducing soil moisture levels. As the cropping season is still at an early stage in these two countries, rainfall performance in the coming months is crucial to determine the output of the 2021 winter cereal crops. Elsewhere in the subregion, satisfactory precipitation levels since November 2020 brought adequate snow volumes in mountain areas of **Kyrgyzstan**, **Tajikistan** and in most parts of the main winter wheat producing regions of southern **Kazakhstan** (specifically in southeastern Almaty and Zhambyl provinces), protecting crops from winterkill in case of severe frosts. By contrast, in the southern Turkestan Province, snowcover was still absent in most croplands as of early February. The presence of snow in mountain areas is also crucial to ensure moisture reserves for crop development in the spring and a source of water for the Amu Darya River, which provides water for irrigation in the summer period (June-August) in Tajikistan, Uzbekistan and Turkmenistan.

Near-average wheat production obtained in 2020

The aggregate 2020 subregional cereal output is estimated at a near-average level of 35.6 million tonnes. Production of wheat, which accounts for more than 70 percent of the total cereal output, reached a near-average level of 25.1 million tonnes, reflecting larger-than-average harvests in **Kyrgyzstan** and **Kazakhstan** that offset production declines in **Turkmenistan** and **Uzbekistan**. In Kazakhstan, the main wheat producer in the subregion, the 2020 domestic wheat output is estimated at an above-average level of 14.3 million tonnes, primarily the result of a large-planted area. The 2020 aggregate subregional coarse grain production is estimated at 9.3 million tonnes, 6 percent above the five-year average.

Export and domestic prices of wheat flour above year-earlier levels

In **Kazakhstan**, export prices of wheat flour remained stable between October 2020 and January 2021, mainly due to weak demand from importing countries. However, prices in January were about 8 percent above their levels a year before, following the sharp increases recorded in April and May 2020 as a result of the outbreak of the COVID-19 pandemic. Domestic retail prices of wheat flour rose slightly between September and December 2020 and were either stable or decreased in January 2021, but they remained above the levels of a year before. A year on year weaker domestic currency contributed to the annual exerting inflationary pressure on domestic prices.

In importing countries of the subregion, domestic retail prices of wheat flour

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
CIS in Asia	25.2	23.0	25.1	8.8	9.4	9.3	35.1	33.6	35.6	6.0
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	1.4	3.2	3.5	3.3	-7.7
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	14.3	4.7	5.1	5.0	18.9	17.1	19.8	15.5
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	0.4	0.3	1.3	1.3	1.3	-4.0
Turkmenistan	1.3	1.6	1.2	0.1	0.1	0.1	1.5	1.8	1.4	-21.0
Uzbekistan	6.3	6.1	6.0	1.0	1.0	1.0	7.6	7.4	7.3	-1.2

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

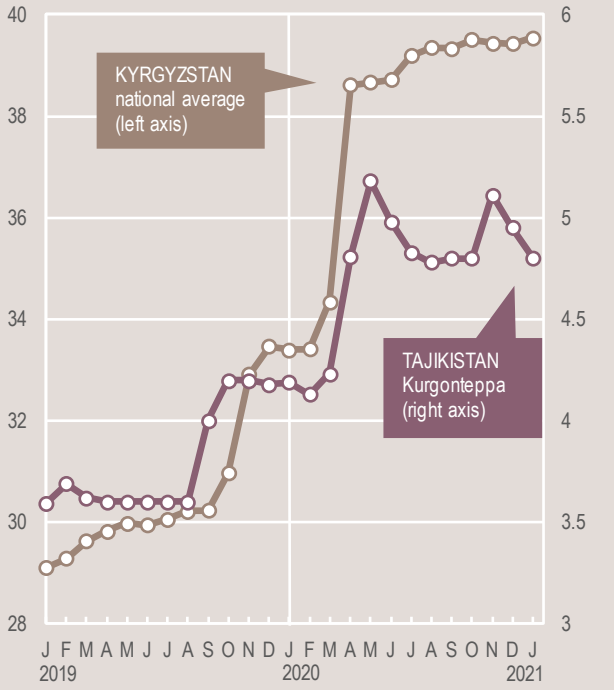
[1] Total cereals includes wheat, coarse grains and rice (paddy).

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

showed mixed trends in recent months. Prices remained stable between July 2020 and January 2021 in **Kyrgyzstan**, on account of the large 2020 domestic wheat harvest and reflecting the effects of a six-month export ban on wheat grain and flour products, as well as other agricultural commodities, introduced in November 2020. In **Tajikistan**, wheat flour prices increased between September and November 2020 and decreased afterwards. In both countries, prices in January 2021 were well above their year-earlier levels, following steep increases in early 2020 and due to a strong depreciation of the domestic currencies. In **Armenia** and **Georgia**, domestic prices have been slightly increasing since November 2020, with seasonal trends exacerbated by the high export quotations from the Russian Federation, the main wheat supplier to the countries and, in January 2021, prices were significantly higher on a yearly basis.

Retail wheat flour prices in selected CIS in Asia countries

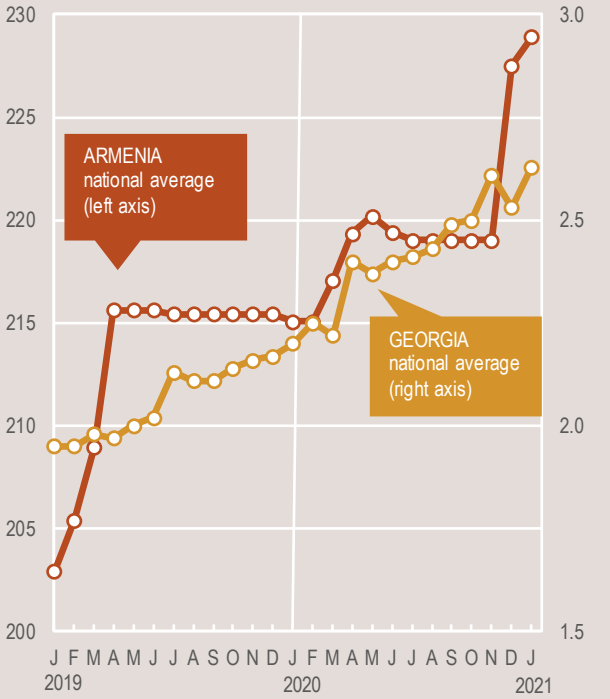
(Som/kg) (Somoni/kg)



Sources : National Statistical Committee of the Kyrgyz Republic; Statistical Agency under the President of the Republic of Tajikistan.

Retail wheat flour prices in selected CIS in Asia countries

(Armenian Dram/kg) (Lari Georgia/kg)



Sources : National Statistical Service of the Republic of Armenia; National Statistics Office of Georgia.

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

** See Terminology (*page 6*).
A dispute exists between the governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

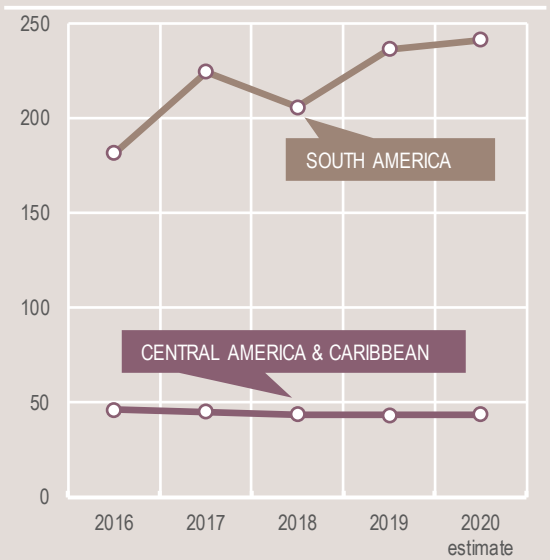
Source: GIEWS, 2021. Conforms to the United Nations map No. 4170 Rev. 19, 2020.

Latin America and the Caribbean Production Overview

Cereal production in 2020 is estimated at a new record high of 285 million tonnes, driven by bumper maize outputs in South America. In Central America, despite crop losses registered in November following the passage of two hurricanes, the 2020 maize output is expected at a near-average level, mainly reflecting an above-average main season production, harvested prior to the hurricanes.

Regarding the 2021 cereal crops, large maize plantings in the main South American producing countries are expected to push up aggregate production to an all-time high, although adverse weather has cutback yield prospects, containing production expectations. In Central America, early indications in Mexico point to an above-average planted area to maize in 2021, underpinned by remunerative prices.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat area expected to be below average in 2021

In **Mexico**, planting of the 2021 main season (mainly irrigated) wheat crop was nearing completion by the end of February. According to the official planting survey, the sown area is expected at a below-average level, as farmers continue to shift production away from wheat to the more remunerative maize crop. Furthermore, weather forecasts for the March-May 2021 period point to drier and hotter-than-average conditions and this is likely to cause a reduction in water supplies for irrigation, with negative consequences for crop yields.

With regard to Mexico's 2021 maize crop, planting of the first minor season crop is ongoing. The official survey of planting intentions suggests a slightly above-average area, which mostly reflects higher year-on-year prices. In addition, production incentives by the Government of Mexico have also encouraged farmers to expand the area sown. According to the incentive schemes, the Government will purchase maize grain harvested in the second quarter of 2021 by medium-size farms (up to 50 hectares) and pay an additional MXN 100 (about USD 5) for each tonne purchased.

Maize output in 2020 estimated at near-average level

Harvesting of the 2020 maize crop is almost complete, except in northern **Guatemala** and **Nicaragua** where the "Apante" season harvest, which accounts for about 10 percent of the domestic output, is expected to continue until April. The subregional 2020 maize output is forecast at a near-average level of 32 million tonnes. In the largest cereal-producing country, **Mexico**, where the harvest of the 2020 main season crop was completed in January 2021, maize production is officially estimated at an average 27.4 million tonnes. Elsewhere, the main season outputs were above average due to large plantings and excellent yields resting on favourable weather conditions. However, the two consecutive hurricanes in early November 2020 affected the minor season crops in **Guatemala**, **Honduras** and **Nicaragua**. In **El Salvador**, where the impact of the hurricanes was minimal, maize production is officially estimated at a well above-average level of 886 000 tonnes.

In **Haiti**, harvesting of the 2020 third season maize crop is set to start in March in western Artibonite, as well as in southern and northeastern regions, and crop conditions were generally favourable prior to the harvest period. However, the total aggregate maize output is estimated at a low level of 205 000 tonnes due to reduced production from the main season crop. Farmers' access to agricultural inputs was also constrained by high prices, an additional factor contributing to the overall low maize output. Similarly, paddy production in 2020 declined for the second consecutive year, underpinned by low plantings and limited use of fertilizers owing to prohibitive prices. In **the Dominican Republic**, the 2020 paddy output (mainly irrigated) is estimated at an above-average level of 1 million tonnes, declining for the first time on account of reduced water supplies for irrigation.

According to the latest weather forecasts by the International Research Institute for Climate and Society (IRI), the likelihood that either El Niño or La Niña conditions occur in the Northern Hemisphere in the April-August period is low. This suggests normal weather conditions during the main cropping season, bolstering yield prospects.

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
Central America and the Caribbean	3.5	3.2	3.0	37.6	37.3	37.8	2.8	2.9	2.9	43.9	43.4	43.7	0.6
El Salvador	0.0	0.0	0.0	0.9	0.9	1.0	0.0	0.0	0.0	1.0	0.9	1.0	8.6
Guatemala	0.0	0.0	0.0	2.0	2.0	1.9	0.0	0.0	0.0	2.0	2.1	2.0	-4.2
Honduras	0.0	0.0	0.0	0.6	0.5	0.6	0.1	0.1	0.0	0.6	0.5	0.6	19.2
Mexico	3.5	3.2	3.0	32.8	32.6	33.1	0.3	0.3	0.3	36.5	36.2	36.4	0.7
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

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

Cereal imports forecast to rise to an above-average level in 2020/21

During the last seven years, cereal imports have been increasing in the subregion, reflecting growing demand for yellow maize from the feed industry and for wheat for human consumption. Cereal import requirements in the 2020/21 marketing year (September/August) are forecast at an above-average level of 38 million tonnes, with maize imports accounting for two-thirds.

Prices of beans spiked in late 2020

In **Honduras** and **Nicaragua**, prices of red beans increased from November 2020 to January 2021 following the reduced hurricane-affected harvests. In **Guatemala**, prices of black beans also increased in November after the hurricanes affected crops but subsequently decreased in December reflecting improved market availabilities from the main season harvest. In **El Salvador**, where crops were unaffected by the hurricanes, prices soared later in January 2021 following the increase in export prices in Nicaragua, its major supplier. Overall, as of January 2021, prices of beans in the subregion were at least 15 percent higher year on year.

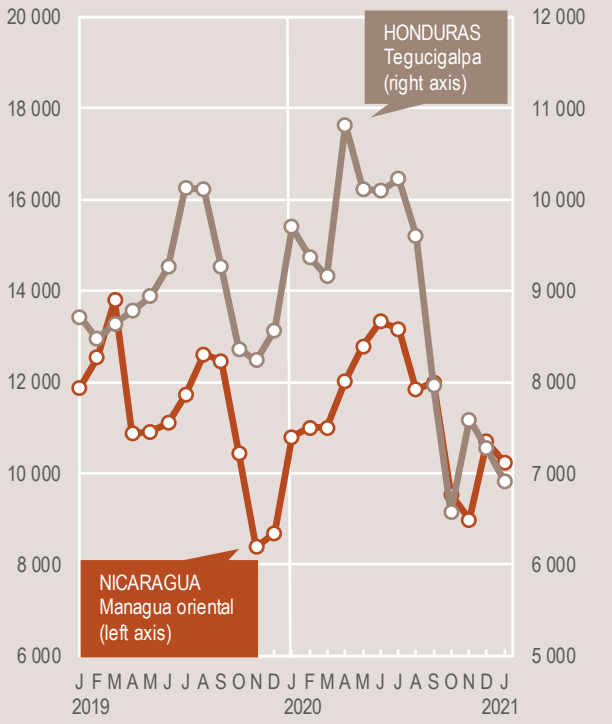
Prices of white maize were lower year on year reflecting ample availabilities following the above-average main season output, harvested between August and October 2020. In **Guatemala, Honduras** and **Nicaragua**, prices generally declined in January 2021, while they remained stable since November in **El Salvador**.

In **Haiti**, prices of locally produced maize and black beans weakened between October and December 2020 as the newly harvested second season crops bolstered domestic availabilities. Prices of mostly imported rice, after declining in the September-October period, rebounded following the weakening of the currency in December. In **the Dominican Republic**, prices of red beans weakened in January 2021 but were still more than 20 percent higher than their year-earlier levels due to the sustained increases that occurred during the second half of 2020.

Food insecurity worsens due to the COVID-19 pandemic and hurricanes

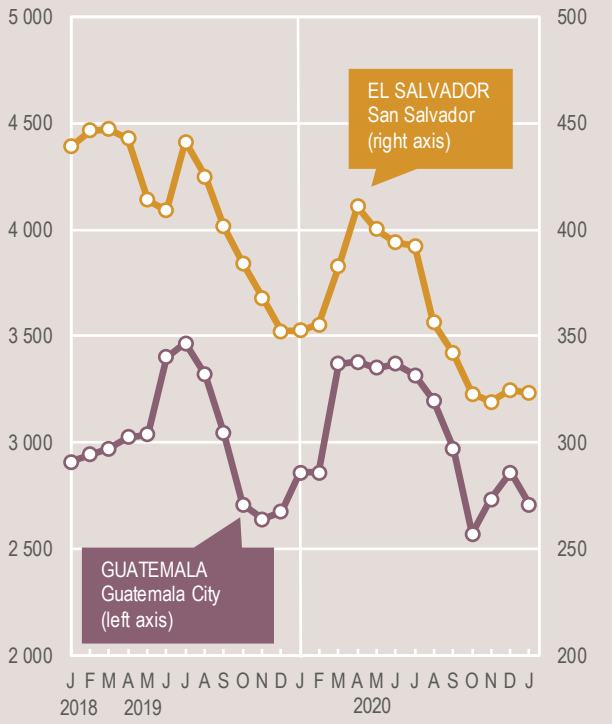
According to IPC analysis, about 8.4 million people are forecast to be food insecure in the subregion and require urgent humanitarian assistance in the second quarter of 2021, with 4.4 million in **Haiti**, 3 million in **Honduras** and nearly 1 million in **El Salvador**. In **Guatemala**, the number of food insecure people is estimated at 3.7 million in the November 2020-March 2021 period. The economic downturn due to the COVID-19 pandemic and associated losses of jobs, incomes and remittances exacerbated the pre-pandemic food insecurity levels. The passage of two hurricanes in November has also aggravate food insecurity conditions of vulnerable households, particularly in Guatemala and Honduras.

Wholesale white maize prices in selected Central America countries



Sources : Secretaria de agricultura y ganaderia, Honduras; Ministerio agropecuario y forestal, Nicaragua.

Wholesale white maize prices in selected Central America countries



Sources : Ministerio de agricultura, ganadería y alimentación, Guatemala; Dirección general de economía agropecuaria, El Salvador.

SOUTH AMERICA

Maize production forecast well above average in 2021

Planting of the 2021 maize crop concluded in December 2020 in Argentina, Chile and Uruguay under dry weather conditions and was completed by late February in Brazil and Paraguay. In **Argentina**, plantings are officially forecast at 9.4 million hectares, similar to the record of the previous year as farmers responded positively to the high domestic grain prices and strong export demand. Improved rainfall from January 2021 increased soil moisture levels and favoured crops at vegetative and flowering stages in the main producing provinces of Buenos Aires and Córdoba. Reflecting the near-record sowings, the early forecast for the 2021 maize output is set at a well above-average level. In **Brazil**, harvesting of the 2021 first minor season maize crop is underway and crop yields in the key producing southern areas were reportedly low, reflecting unfavourable weather conditions. Following a delayed start, planting of the 2021 main season maize crop is ongoing amid generally conducive weather conditions. The area planted with the main season crop is officially forecast to increase compared to last year's record-high level, driven by strong domestic and export demand. As of mid-February, the official forecast puts the 2021 maize production at a record 105 million tonnes. In **Paraguay**, following a delayed start of the 2021 main season planting amid dry weather conditions, increased precipitation in January sped up planting operations and benefited germination of early-planted crops. In **Uruguay**, the planted area is officially estimated well above the average due to high domestic prices. However, production prospects are uncertain as the germinating crops were affected by reduced rainfall amounts at the end of last year. In **Chile**, the maize planted area is officially estimated at a similar level to the historic low of 2020, as farmers continued to shift production to the more profitable horticultural crops. Dry weather conditions that led to soil moisture deficits, further encouraging farmers to reduce the maize acreage this year, also adversely affected crops at flowering and grain-filling stages in the major producing O'Higgins and Maule regions. In the northern parts of the subregion, planting of the 2021 first maize crop is expected to be finalized in April in **Colombia** and **Peru**. Plantings are officially forecast to be slightly above the average in Peru, while they are anticipated to decline for a sixth consecutive year in Colombia. In **Ecuador**, planting operations for the main season maize crop are ongoing under favourable weather conditions and a large sown area is expected due to high domestic prices. In **Bolivia (Plurinational State of)**, the main season maize crop was planted under dry weather conditions in late 2020 and some crops in Santa Cruz and Cochabamba departments were reportedly affected by torrential rains in January.

Cereal production in 2020 estimated at an all-time high

The 2020 subregional cereal output is estimated at a record-high level of 241 million tonnes, approximately 15 percent above the five-year average. The bumper production reflects an all-time high maize output, estimated at 173 million tonnes, owing to large harvests in **Argentina**, **Brazil**, **Paraguay** and **Uruguay**. Wheat production in the subregion is estimated at a slightly above-average level of 27 million tonnes in 2020. In **Argentina**, the main wheat producing country in the subregion, harvesting of the 2021 crop was completed in January and the output is estimated at an average level, as large plantings offset the effects of a reduction in yields. In **Brazil** and **Uruguay**, the 2020 wheat outputs are officially estimated at above-average levels on account of large plantings and excellent yields, respectively. By contrast, production is estimated to be below average in **Chile** and **Paraguay**, as a result of a reduced area sown.

Cereal exports estimated at record levels in 2020/21

Aggregate cereal exports in the 2020/21 marketing year (March/February) are estimated at a new record of 95 million tonnes. This estimate is underpinned by significant quantities of maize exports from **Argentina** and **Brazil**, reflecting record maize harvests and weak currencies that increased the competitiveness of local grains on the international market. Overall, subregional maize exports are estimated at 73 million tonnes in 2020/21, more than 30 percent above the five-year average.

Table 16. South America cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
South America	26.7	28.7	27.8	157.2	184.2	188.8	24.7	23.4	24.8	208.7	236.4	241.4	2.1
Argentina	17.5	19.8	17.6	52.0	63.3	65.8	1.4	1.2	1.2	70.8	84.2	84.6	0.4
Brazil	5.4	5.2	6.2	88.5	103.8	106.3	11.6	10.5	11.2	105.5	119.5	123.7	3.6
Colombia	0.0	0.0	0.0	1.5	1.6	1.5	2.5	2.7	2.9	4.0	4.2	4.4	4.2
Paraguay	1.1	1.3	1.3	5.4	5.7	5.9	0.9	1.1	1.2	7.4	8.1	8.4	4.0
Peru	0.2	0.2	0.2	1.8	1.8	1.7	3.2	3.2	3.3	5.2	5.2	5.2	0.8

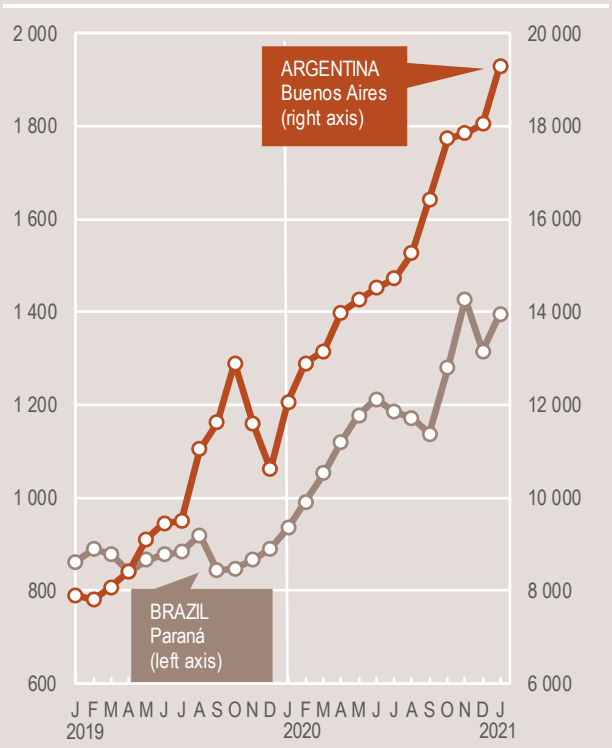
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

Maize and wheat prices increased in the November 2020 to January 2021 period

In line with seasonal trends, prices of yellow maize increased between November 2020 and January 2021 in the key maize producing countries. In **Argentina** and **Brazil**, concerns over the impact of dry weather conditions on yields of the 2021 crops amplified seasonal price increases of yellow maize, which were also well above their year-earlier levels on account of large export sales in 2020/21. Similarly, in **Uruguay**, prices increased sharply in December 2020 and January 2021 supported by unfavourable yield prospects. In the same period, maize prices also increased seasonally in **Ecuador**. In **Peru**, prices have been rising since August 2020 and by January 2021 were nearly 30 percent higher on a yearly basis, due to the effects of a reduced 2020 harvest and smaller import quantities in the last quarter of 2020. By contrast, in **Colombia,** prices declined in January as newly harvested crops from the second season and substantial imports in the September-November period boosted domestic supplies.

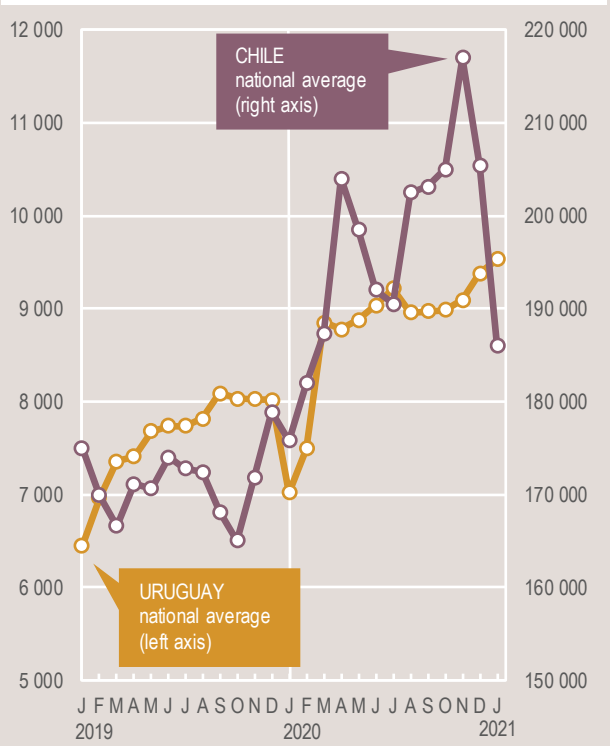
Prices of wheat grain in **Argentina** increased between November 2020 and January 2021 reflecting the reduced harvest in 2020. Strikes of port and transport workers in Argentina in December and January hampered market activities, adding further upward pressure on prices. In **Brazil**, the disrupted trade flows, caused by the strikes in Argentina, resulted in low imports during this period, triggering an increase in wheat prices in January. Prices increased in **Uruguay** reaching record highs, supported by strong export demand during the last months of 2020. By contrast, prices declined since December 2020 in **Chile** on supply pressure, reflecting increased import volumes and new supplies from the 2020 harvest. In **Colombia**, **Ecuador** and **Peru**, prices were overall stable reflecting adequate imports.

Wholesale wheat prices in selected countries in South America



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

Wholesale wheat prices in selected countries in South America



Sources : Instituto nacional de estadística, Uruguay; Cotrisa, Chile.

Wholesale rice prices in selected countries in South America

Sources : Departamento administrativo nacional de estadística (DANE), Colombia; Instituto de economía agrícola, Brazil.

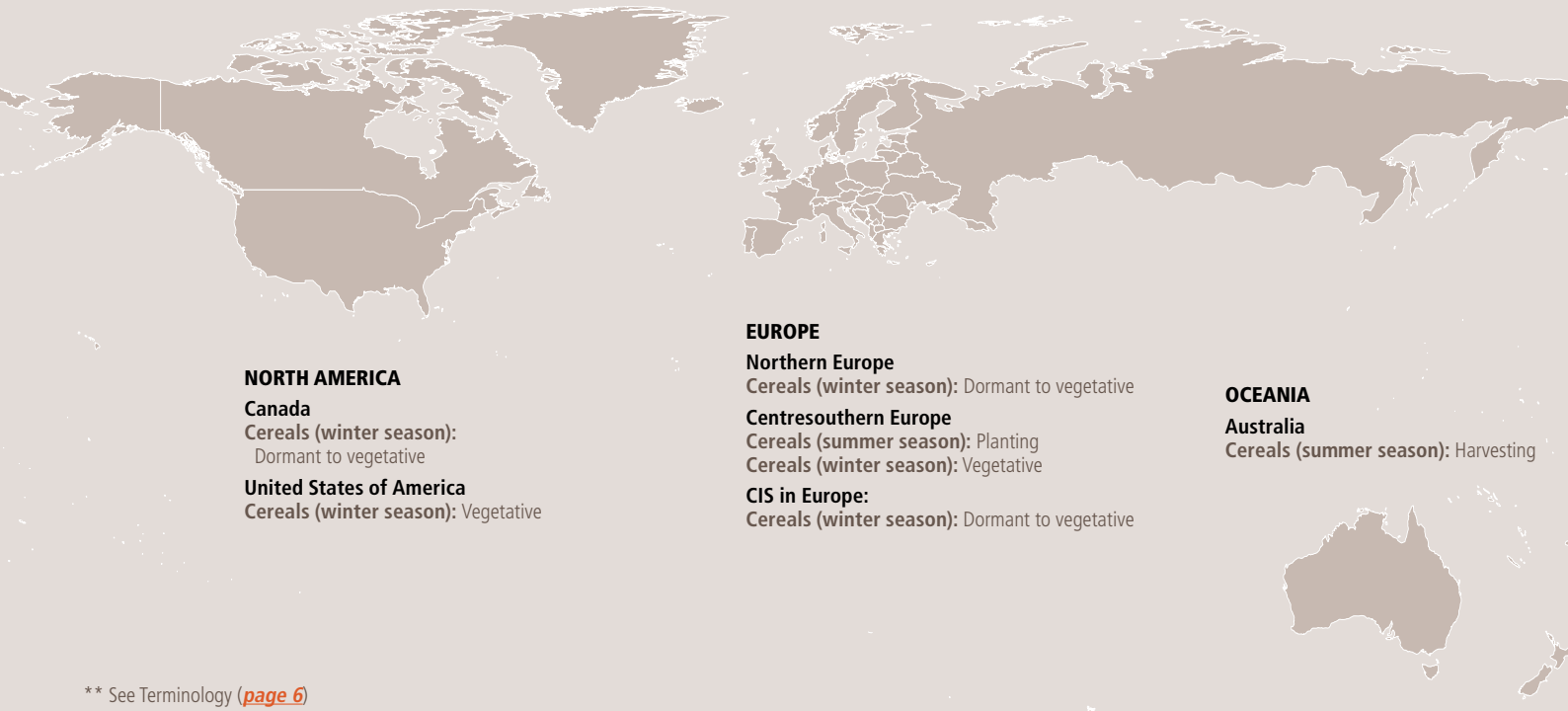
Prices of rice in **Brazil** were higher on a yearly basis at the start of 2021 following increases during the last quarter of 2020, but prices declined in January reflecting better production prospects. Prices decreased in **Colombia** between November 2020 and January 2021 and were more than 10 percent below their levels in January 2020 reflecting ample domestic availabilities.

Food security of Venezuelan migrants likely to deteriorate

In the 2017-2019 period, the prevalence of undernourishment was estimated at 31.4 percent in **the Bolivarian Republic of Venezuela**, a significant increase compared to 8.6 percent in the pre-crisis 2013-2015. In search of income-earning opportunities, about 5.4 million people left the country during the last six years and settled in neighbouring countries, mostly in Colombia (1.7 million), Peru (1 million), Chile (457 000) and Ecuador (416 000). In 2020, the livelihoods of the Venezuelan refugees and migrants deteriorated amid the COVID-19 pandemic containment measures put in place in the host countries, with severe consequences on their access to food. According to recent surveys, more than 70 percent of Venezuelan migrants experienced a significant decrease in income and about 40 percent of Venezuelans were evicted from their dwelling amid the COVID-19 pandemic. While over 135 000 migrants returned to their country, some have reportedly re-entered the host countries since September 2020 following a gradual lifting of the restrictive measures. According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela (R4V), Venezuelans are expected to continue to emigrate in 2021, although to a lesser extent than in the previous years, and the proportion of people in an irregular situation is expected to increase as a result of border closures and entry restrictions. This, coupled with the slow recovery of the host countries' economy, is likely to have negative consequences on food security of Venezuelan refugees and migrants.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of February
Territories/boundaries**



NORTH AMERICA

Canada
Cereals (winter season): Dormant to vegetative

United States of America
Cereals (winter season): Vegetative

EUROPE

Northern Europe
Cereals (winter season): Dormant to vegetative

Centresouthern Europe
Cereals (summer season): Planting
Cereals (winter season): Vegetative

CIS in Europe:
Cereals (winter season): Dormant to vegetative

OCEANIA

Australia
Cereals (summer season): Harvesting

** See Terminology (*page 6*)

Source: GIEWS, 2021. Conforms to the United Nations map No. 4170 Rev. 19, 2020.

North America, Europe and Oceania Production Overview

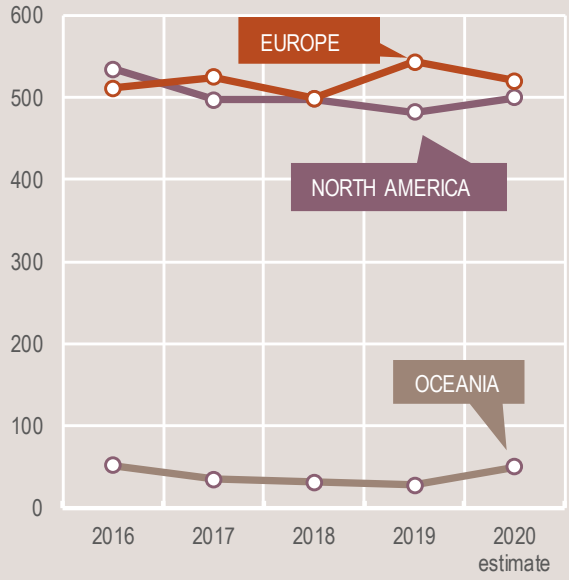
In the United States of America, despite a foreseen increase in total wheat plantings in 2021, adverse weather has curbed yield prospects for the main winter wheat crop and consequently aggregate wheat production is forecast to remain unchanged and below average in 2021. In Canada, official forecasts point to a contraction in wheat production on lower yields.

Following the reduced output in 2020, wheat production in the European Union is forecast to rebound strongly in 2021, largely owing to an expansion in plantings. Conducive weather conditions have also supported good yield prospects and wheat production is expected to increase by more than 10 million tonnes in 2021.

In CIS Europe, dry weather conditions in the Russian Federation have dragged down production prospects for the 2021 wheat crop and the total output is forecast to decline by about 7 million tonnes in 2021 compared to the high level of 2020. In Ukraine, owing to overall conducive weather, wheat production is expected to increase moderately to a near-average level in 2021.

In Australia, harvesting of the 2020 wheat crop recently concluded and production is estimated to have increased two-fold in 2020. Sowing of the 2021 summer season crops is reported to have expanded sharply.

Cereal production
(million tonnes)



NORTH AMERICA

Adverse weather conditions contain 2021 wheat prospects in the United States of America

In the **United States of America**, the aggregate area planted to wheat in 2021 is forecast to increase by about 1 percent over the previous year to 18.2 million hectares, a level still below the five-year average. The small expansion reflects an estimated increase in the area sown to the winter wheat crop, planted in September and October 2020, which would more than compensate for an expected reduction in spring sowings, to be planted between April and May; the foreseen contraction in spring plantings is underpinned by better price prospects for competing maize and soybean crops. Unconducive weather conditions since October 2020 have curbed yield prospects of the winter wheat crop, which accounts for more than 70 percent of the total output. As a result, aggregate wheat production in 2021 is forecast to remain close to last year's below-average level of 50 million tonnes.

Planting of the 2021 maize crop is expected to begin in April. The preliminary production outlook indicates a second consecutive year-on-year increase, on larger sowings and an upturn in yields following the weather-reduced levels in 2020.

In **Canada**, the bulk of the wheat crop is produced during the summer months, between April and October. Based on official projections, total wheat plantings are forecast to decline by 3 percent on a yearly basis in 2021, reflecting lower profit prospects compared to alternative crops. However, wheat production is still forecast at an above-average level of about 33 million tonnes, supported by expectations of good yields. At this level, the anticipated output is nevertheless 6 percent below the record high of 2020.

EUROPE

EUROPEAN UNION

Wheat production forecast to rebound in 2020

In the **European Union**, planting of the 2021 secondary spring crop is underway and the aggregate area, including the main winter crop planted in the last quarter of 2020, is forecast to increase by more than 5 percent over last year's low level. A large proportion of the increase is associated with a rebound in sowings in France, after excessive rainfall curtailed plantings in 2020. Weather conditions have been mostly beneficial throughout the current season and, although a cold spell in February caused minor frost damage, yields prospects remain generally positive. Overall, the 2021 wheat output is forecast to increase compared to the weather-stricken harvest of 2020 and is preliminarily pegged at 137 million tonnes.

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	5-yr Avg.	2019	2020 estim	Change: 2020/2019 (%)
North America	85.0	84.9	84.9	405.5	388.5	404.7	9.1	8.4	10.3	499.6	481.8	499.9	3.8
Canada	31.0	32.3	35.2	26.8	28.7	29.8	0.0	0.0	0.0	57.8	61.1	64.9	6.4
United States of America	54.0	52.6	49.7	378.7	359.8	374.9	9.1	8.4	10.3	441.8	420.8	435.0	3.4
Europe	257.9	266.2	253.1	254.4	273.3	263.3	4.1	4.0	4.0	516.4	543.5	520.5	-4.2
Belarus	2.4	2.3	2.2	4.7	4.7	4.8	0.0	0.0	0.0	7.1	7.0	7.0	-0.2
European Union[1]	150.3	155.7	125.2	157.1	166.6	154.6	2.9	2.9	2.8	310.2	325.2	282.6	-13.1
Russian Federation	73.5	74.5	85.9	41.2	42.3	42.6	1.1	1.1	1.1	115.8	117.9	129.6	10.0
Serbia	2.6	2.5	3.0	6.8	7.9	8.6	0.0	0.0	0.0	9.4	10.4	11.6	11.2
Ukraine	26.3	28.3	25.1	39.7	46.4	39.8	0.1	0.1	0.1	66.1	74.8	64.9	-13.2
Oceania	22.0	15.6	33.7	14.1	12.2	16.2	0.5	0.1	0.1	36.6	27.9	50.0	78.9
Australia	21.6	15.2	33.3	13.4	11.6	15.5	0.5	0.1	0.1	35.5	26.8	48.9	82.3

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.

CIS IN EUROPE

Generally favourable weather conditions for 2021 winter cereals, except in the Russian Federation

Planting of the 2021 winter cereal crops, was completed last November and the aggregate area sown in the subregion is estimated at a slightly above-average level. In **the Russian Federation**, warmer and drier-than-average weather conditions in December 2020 raised concerns for winter crops, but abundant snow and rainfall in January and February 2021 improved soil moisture levels. As of mid-February, crop conditions were reported to be generally favourable in the Central and North Caucasian districts. By contrast, in the Southern District, a key winter crop producing area, snowcover has been insufficient and winterkill may result in a reduction in the harvested area. As a result, wheat production in 2021 is forecast to fall by about 7 million tonnes compared to last year's high level. Since the beginning of the season, weather conditions in **Belarus**, **the Republic of Moldova** and **Ukraine** have been generally favourable for winter crops. Although temperatures fell to below-average levels in early February, sufficient snow levels prevented crops from freezing. Snowcover is also crucial to secure good moisture reserves in early spring (March-April), when plant growth resumes.

Planting of the 2021 spring cereals, to be harvested between July and September, is expected to begin in April. In **the Russian Federation**, the area planted with spring wheat is expected at a below-average level as a consequence of the introduction of a floating tax on wheat exports, from 2 June 2021, which would reduce the crop's profitability.

Bumper wheat shipments forecast from the Russian Federation in 2020/21

The 2020 subregional cereal output is estimated at 202.3 million tonnes, 6 percent above the five-year average level, reflecting above-average outputs of wheat and barley. In **the Russian federation**, production of wheat, the principal cereal grown in the subregion, is officially estimated at 85.8 million tonnes in 2020, 15 percent above the five-year average. The country's large domestic supply and robust export demand is foreseen to drive up wheat exports to 39 million tonnes in the 2020/21 marketing year (July/June), a well above-average quantity. Underpinned by concerns over tightening domestic supplies and to limit further price increases, the Russian Ministry of Economy introduced a series of taxes on wheat exports and an export quota on grains (wheat, rye, barley, oats and maize) between 15 February and 30 June 2021 to temper the export pace. The quota, however, excludes restrictions on exports to members of the Eurasian Economic Union.

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

Source : International Grains Council.

In **Ukraine**, the 2020 wheat output is officially estimated at 25.1 million tonnes, 5 percent below the average and, reflecting the lower harvest, wheat exports in 2020/21 are likely to fall short of the Government's target of 17.5 million tonnes. By contrast, the 2020 maize output is officially estimated at 30.3 million tonnes, slightly above the average level, due to record high plantings. In the 2020/21 marketing year (July/June), maize exports from Ukraine are expected to reach a near-average level of 24 million tonnes, corresponding to the quota set by the Ministry of Economic Development, Trade and Agriculture on 26 January 2020.

Export prices of wheat increased

In **the Russian Federation** and **Ukraine**, export prices of milling wheat increased between October 2020 and January 2021, mainly due to strong demand by importing countries. Prices in both countries, which increased by 3 percent between October and December 2020, increased by almost 10 percent in January alone, reaching levels 25 percent above those recorded a year before and the highest since June 2014. In **the Russian Federation**, the latest increase follows the announcement of the introduction of taxes on wheat exports and the export quota, while in **Ukraine**, it is due to tightening availabilities of milling quality wheat.

In the domestic markets, wholesale prices of milling wheat decreased slightly in December 2020 but increased sharply in January 2021 in **Ukraine**, in line with seasonal trends, while prices slightly declined over the same period in **the Russian Federation**. In both countries, domestic prices remained well above their year-earlier levels, particularly in Ukraine, reflecting the reduced harvest in 2020. Year-on-year weaker currencies contributed to the annual increase in prices in both the export and domestic markets.

OCEANIA

Cereal production rebounds in 2020

In **Australia**, harvesting of the 2020 winter wheat and barley crops recently concluded. Wheat production is officially estimated at a record high of 33.3 million tonnes, more than double the drought-reduced 2019 crop. The large output reflects a significant expansion in the planted area and above-average yields. Barley production is estimated at a near-record level of 13.1 million tonnes, largely resulting from above-average yields.

Planting of the 2021 summer cereal crops was completed in January and the sown area is officially estimated above the five-year average. A major increase in sowings is reported for sorghum, the main summer cereal crop, with the area estimated to be 25 percent above the average.

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	*36.1*	*36.1*	*38.4*	*36.2*	*36.7*	*37.9*
Coarse grains	*26.2*	*27.1*	*27.3*	*25.7*	*24.0*	*21.7*
Rice	*35.4*	*34.8*	*35.3*	*36.8*	*35.4*	*35.1*
Total cereals	***30.7***	***31.0***	***31.9***	***30.7***	***29.6***	***28.6***
Ratio of major cereal exporters' supplies to market requirements (%)[1]	*121.4*	*123.7*	*122.9*	*116.9*	*118.7*	*115.7*
Ratio of major exporters' stocks to their total disappearance (%)[2]						
Wheat	*18.4*	*19.8*	*21.0*	*18.0*	*15.4*	*15.9*
Coarse grains	*14.9*	*14.8*	*15.7*	*16.0*	*14.5*	*12.3*
Rice	*20.7*	*18.9*	*18.1*	*22.6*	*24.3*	*24.7*
Total cereals	***18.0***	***17.8***	***18.3***	***18.9***	***18.1***	***17.6***

	Annual trend growth rate 2010-2019	Change from previous year 2016	2017	2018	2019	2020
Changes in world cereal production (%)	*2.0*	*3.0*	*1.2*	*-1.7*	*2.3*	*1.9*
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*

	2018	2019	2020	2021*	Change 2021* over 2020*
Selected cereal price indices[3]					
Wheat	*99.0*	*95.3*	*100.7*	*118.8*	*18.6%*
Maize	*99.1*	*94.6*	*100.8*	*137.9*	*41.5%*
Rice	*106.3*	*101.5*	*110.2*	*115.2*	*11.0%*

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-February average.

Table A2. World cereal stocks

(million tonnes)

	2016	2017	2018	2019	2020 estimate	2021 forecast
TOTAL CEREALS	***788.6***	***823.6***	***858.0***	***832.3***	***818.7***	***811.1***
Wheat	***243.4***	***266.0***	***288.0***	***272.0***	***276.9***	***292.0***
held by:						
- main exporters[1]	*70.4*	*79.9*	*84.3*	*70.9*	*62.8*	*62.5*
- others	*173.0*	*186.1*	*203.7*	*201.1*	*214.1*	*229.5*
Coarse grains	***373.0***	***384.2***	***393.4***	***374.9***	***359.6***	***336.6***
held by:						
- main exporters[1]	*106.4*	*120.0*	*130.6*	*131.4*	*124.0*	*107.0*
- others	*266.6*	*264.2*	*262.8*	*243.5*	*235.6*	*229.6*
Rice (milled basis)	***172.2***	***173.4***	***176.6***	***185.4***	***182.2***	***182.5***
held by:						
- main exporters[1]	*34.5*	*33.2*	*32.3*	*39.6*	*43.2*	*45.8*
- others	*137.7*	*140.2*	*144.3*	*145.8*	*139.0*	*136.7*
Developed countries	***171.0***	***197.3***	***198.9***	***190.1***	***175.8***	***163.7***
Australia	*7.2*	*9.5*	*7.3*	*7.5*	*5.7*	*11.2*
Canada	*10.0*	*12.5*	*11.1*	*9.4*	*9.5*	*9.4*
European Union[2]	*40.8*	*35.2*	*45.3*	*44.4*	*44.8*	*36.9*
Japan	*7.3*	*6.6*	*6.7*	*6.5*	*6.8*	*6.8*
Russian Federation	*11.9*	*20.3*	*23.1*	*14.6*	*13.0*	*17.1*
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*	*4.8*
United States of America	*76.1*	*95.8*	*88.8*	*91.3*	*80.7*	*63.2*
Developing countries	***617.5***	***626.3***	***659.1***	***642.2***	***643.0***	***647.4***
Asia	***521.5***	***530.8***	***543.8***	***529.7***	***535.4***	***541.2***
China (Mainland)	*371.2*	*392.4*	*400.4*	*385.0*	*384.5*	*383.2*
India	*42.3*	*34.6*	*42.6*	*50.8*	*56.3*	*57.9*
Indonesia	*10.2*	*9.2*	*10.2*	*11.5*	*9.0*	*7.7*
Iran (Islamic Republic of)	*9.9*	*11.6*	*10.6*	*9.1*	*9.9*	*11.4*
Korea, Republic of	*4.9*	*4.5*	*4.1*	*2.6*	*2.6*	*3.1*
Pakistan	*6.0*	*6.0*	*5.4*	*3.6*	*2.0*	*3.0*
Philippines	*4.1*	*3.7*	*4.1*	*4.8*	*4.0*	*3.9*
Syrian Arab Republic	*1.7*	*1.2*	*1.7*	*1.5*	*2.2*	*2.7*
Turkey	*7.3*	*6.0*	*7.1*	*6.6*	*10.1*	*11.7*
Africa	***56.5***	***54.6***	***61.3***	***61.9***	***58.0***	***59.4***
Algeria	*5.7*	*5.6*	*5.3*	*6.6*	*6.9*	*6.0*
Egypt	*7.7*	*7.4*	*6.9*	*5.1*	*5.8*	*6.2*
Ethiopia	*4.2*	*4.8*	*5.6*	*6.3*	*7.3*	*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***	***9.9***	***9.4***
Mexico	*4.6*	*6.5*	*7.6*	*7.5*	*7.3*	*7.1*
South America	***31.3***	***30.5***	***43.0***	***40.1***	***39.3***	***37.0***
Argentina	*7.7*	*7.4*	*12.4*	*12.8*	*12.7*	*9.7*
Brazil	*14.2*	*12.7*	*19.9*	*16.8*	*16.5*	*17.6*

Source: FAO

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

[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] 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						
2019 - February	234	217	244	170	170	170
2019 - March	223	201	231	167	163	170
2019 - April	213	195	220	161	155	164
2019 - May	212	203	218	172	166	164
2019 - June	227	222	243	196	183	164
2019 - July	216	202	244	188	177	158
2019 - August	203	197	238	162	151	147
2019 - September	200	200	228	157	145	149
2019 - October	212	213	229	168	157	164
2019 - November	220	225	198	167	167	162
2019 - December	225	238	203	168	173	165
2020 - January	237	249	226	172	185	167
2020 - February	230	240	240	170	180	165
2020 - March	227	230	243	162	170	165
2020 - Aprill	232	222	244	145	155	165
2020 - May	223	211	239	144	146	176
2020 - June	216	200	241	149	149	173
2020 - July	220	210	244	151	153	180
2020 - August	221	207	240	148	163	195
2020 - September	246	220	246	166	185	217
2020 - October	273	245	257	187	217	236
2020 - November	275	250	259	193	226	247
2020 - December	267	249	269	199	232	253
2021 - January	291	280	282	233	257	286
2021 - February	291	278	272	246	248	300

Sources: International Grains Council and USDA.

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

[2] Delivered United States Gulf.

[3] Up River f.o.b.

Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2019/2020 or 2020

(thousand tonnes)

		2018/19 or 2019			2019/20 or 2020
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total imports (excl. re-exports)
AFRICA		***26 318.8***	***1 024.6***	***27 343.4***	***28 662.8***
East Africa		***10 485.3***	***709.0***	***11 194.3***	***12 050.4***
Burundi	Jan/Dec	*164.1*	*16.0*	*180.1*	*181.3*
Comoros	Jan/Dec	*64.7*	*0.0*	*64.7*	*63.3*
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*	*2 085.0*
Kenya	Oct/Sept	*2 929.3*	*80.0*	*3 009.3*	*3 658.0*
Rwanda	Jan/Dec	*238.6*	*0.0*	*238.6*	*222.3*
Somalia	Aug/Jul	*645.0*	*190.0*	*835.0*	*905.0*
South Sudan	Nov/Oct	*639.0*	*101.0*	*740.0*	*725.0*
Sudan	Nov/Oct	*1 970.0*	*230.0*	*2 200.0*	*2 195.0*
Uganda	Jan/Dec	*529.3*	*23.0*	*552.3*	*548.0*
United Republic of Tanzania	Jun/May	*964.0*	*11.0*	*975.0*	*920.0*
Southern Africa		***2 594.4***	***14.7***	***2 609.1***	***3 066.5***
Lesotho	Apr/Mar	*142.0*	*0.6*	*142.6*	*154.3*
Madagascar	Apr/Mar	*683.0*	*8.0*	*691.0*	*733.7*
Malawi	Apr/Mar	*95.1*	*2.0*	*97.1*	*159.2*
Mozambique	Apr/Mar	*1 367.7*	*1.0*	*1 368.7*	*1 450.0*
Zimbabwe	Apr/Mar	*306.6*	*3.1*	*309.7*	*569.3*
West Africa		***10 798.2***	***144.9***	***10 943.1***	***10 932.3***
Coastal Countries		***6 175.7***	***48.5***	***6 224.2***	***5 762.4***
Benin	Jan/Dec	*471.0*	*6.0*	*477.0*	*187.0*
Côte d'Ivoire	Jan/Dec	*2 100.0*	*5.5*	*2 105.5*	*1 835.5*
Ghana	Jan/Dec	*1 646.7*	*5.0*	*1 651.7*	*1 471.9*
Guinea	Jan/Dec	*782.0*	*5.5*	*787.5*	*957.5*
Liberia	Jan/Dec	*495.0*	*12.0*	*507.0*	*513.0*
Sierra Leone	Jan/Dec	*386.0*	*14.0*	*400.0*	*507.0*
Togo	Jan/Dec	*295.0*	*0.5*	*295.5*	*290.5*
Sahelian Countries		***4 622.5***	***96.4***	***4 718.9***	***5 169.9***
Burkina Faso	Nov/Oct	*712.2*	*11.0*	*723.2*	*752.0*
Chad	Nov/Oct	*148.0*	*41.6*	*189.6*	*189.6*
Gambia	Nov/Oct	*218.1*	*2.5*	*220.6*	*291.0*
Guinea-Bissau	Nov/Oct	*130.0*	*6.3*	*136.3*	*164.3*
Mali	Nov/Oct	*461.2*	*0.0*	*461.2*	*461.2*
Mauritania	Nov/Oct	*557.0*	*13.0*	*570.0*	*570.8*
Niger	Nov/Oct	*540.0*	*18.0*	*558.0*	*606.0*
Senegal	Nov/Oct	*1 856.0*	*4.0*	*1 860.0*	*2 135.0*
Central Africa		***2 440.9***	***156.0***	***2 596.9***	***2 613.6***
Cameroon	Jan/Dec	*1 360.0*	*10.0*	*1 370.0*	*1 360.0*
Congo	Jan/Dec	*329.0*	*2.0*	*331.0*	*286.0*
Central African Republic	Jan/Dec	*73.0*	*23.0*	*96.0*	*95.4*
Democratic Republic of the Congo	Jan/Dec	*660.0*	*120.0*	*780.0*	*850.0*
Sao Tome and Principe	Jan/Dec	*18.9*	*1.0*	*19.9*	*22.2*

Source: FAO

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

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

(thousand tonnes)

		2018/19 or 2019			2019/20 or 2020
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total imports (excl. re-exports)
ASIA		***39 683.4***	***1 190.8***	***40 874.2***	***39 210.9***
Cis in Asia		***4 932.8***	***0.1***	***4 932.9***	***4 692.1***
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	*3 092.9*	*0.0*	*3 092.9*	*2 866.6*
Far East		***24 140.6***	***365.7***	***24 506.3***	***25 059.8***
Bangladesh	Jul/Jun	*7 573.3*	*92.7*	*7 666.0*	*7 866.7*
Democratic People's Republic of Korea	Nov/Oct	*1 314.0*	*271.0*	*1 585.0*	_*
India	Apr/Mar	*230.7*	*0.0*	*230.7*	*657.3*
Nepal	Jul/Jun	*1 183.8*	*2.0*	*1 185.8*	*1 260.8*
Viet Nam	Jul/Jun	*13 838.8*	*0.0*	*13 838.8*	*15 275.0*
Near East		***10 610.0***	***825.0***	***11 435.0***	***9 459.0***
Afghanistan	Jul/Jun	*3 212.0*	*100.0*	*3 312.0*	*2 302.0*
Syrian Arab Republic	Jul/Jun	*3 418.0*	*300.0*	*3 718.0*	*2 727.0*
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***	***1 519.6***
Haiti	Jul/Jun	*784.9*	*10.1*	*795.0*	*864.6*
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		***67 478.8***	***2 225.5***	***69 704.3***	***69 455.3***

Source: FAO

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

* Estimates not yet available.

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2020/2021

(thousand tonnes)

		2019/20			2020/21
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		***15 868.3***	***772.1***	***16 640.4***	***17 709.4***
East Africa		***7 777.0***	***626.0***	***8 403.0***	***8 761.0***
Kenya	Oct/Sept	***3 578.0***	***80.0***	***3 658.0***	***3 700.0***
Somalia	Aug/Jul	*695.0*	*210.0*	*905.0*	*1 005.0*
South Sudan	Nov/Oct	*630.0*	*95.0*	*725.0*	*715.0*
Sudan	Nov/Oct	*1 965.0*	*230.0*	*2 195.0*	*2 366.0*
United Republic of Tanzania	Jun/May	*909.0*	*11.0*	*920.0*	*975.0*
Southern Africa		***3 046.8***	***19.7***	***3 066.5***	***3 520.7***
Lesotho	Apr/Mar	*153.7*	*0.6*	*154.3*	*198.1*
Madagascar	Apr/Mar	*725.7*	*8.0*	*733.7*	*786.0*
Malawi	Apr/Mar	*156.2*	*3.0*	*159.2*	*169.5*
Mozambique	Apr/Mar	*1 445.0*	*5.0*	*1 450.0*	*1 561.0*
Zimbabwe	Apr/Mar	*566.2*	*3.1*	*569.3*	*806.1*
West Africa		***5 044.5***	***126.4***	***5 170.9***	***5 427.7***
Burkina Faso	Nov/Oct	*743.0*	*9.0*	*752.0*	*812.0*
Chad	Nov/Oct	*148.0*	*41.6*	*189.6*	*199.6*
Gambia	Nov/Oct	*284.5*	*6.5*	*291.0*	*269.0*
Guinea-Bissau	Nov/Oct	*158.0*	*6.3*	*164.3*	*154.3*
Mali	Nov/Oct	*461.2*	*0.0*	*461.2*	*501.0*
Mauritania	Nov/Oct	*549.8*	*21.0*	*570.8*	*570.8*
Niger	Nov/Oct	*570.0*	*36.0*	*606.0*	*666.0*
Senegal	Nov/Oct	*2 130.0*	*6.0*	*2 136.0*	*2 255.0*
ASIA		***34 324.8***	***456.1***	***34 780.9***	***36 579.3***
CIS in Asia		***4 692.0***	***0.1***	***4 692.1***	***5 125.5***
Kyrgyzstan	Jul/Jun	*638.4*	*0.1*	*638.5*	*639.5*
Tajikistan	Jul/Jun	*1 187.0*	*0.0*	*1 187.0*	*1 204.0*
Uzbekistan	Jul/Jun	*2 866.6*	*0.0*	*2 866.6*	*3 282.0*
Far East		***24 988.8***	***71.0***	***25 059.8***	***26 171.8***
Bangladesh	Jul/Jun	*7 797.7*	*69.0*	*7 866.7*	*9 454.0*
India	Apr/Mar	*657.3*	*0.0*	*657.3*	*272.0*
Nepal	Jul/Jun	*1 258.8*	*2.0*	*1 260.8*	*1 190.8*
Viet Nam	Jul/Jun	*15 275.0*	*0.0*	*15 275.0*	*15 255.0*
Near East		***4 644.0***	***385.0***	***5 029.0***	***5 282.0***
Afghanistan	Jul/Jun	*2 202.0*	*100.0*	*2 302.0*	*2 812.0*
Syrian Arab Republic	Jul/Jun	*2 442.0*	*285.0*	*2 727.0*	*2 470.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 509.5***	***10.1***	***1 519.6***	***1 487.1***
Haiti	Jul/Jun	*854.5*	*10.1*	*864.6*	*817.1*
Nicaragua	Jul/Jun	*655.0*	*0.0*	*655.0*	*670.0*
TOTAL		***51 702.6***	***1 238.3***	***52 940.9***	***55 775.8***

Source: FAO

Note: Countries included in this table are only those that have entered the new marketing year. The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

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