



Crop Prospects and Food Situation

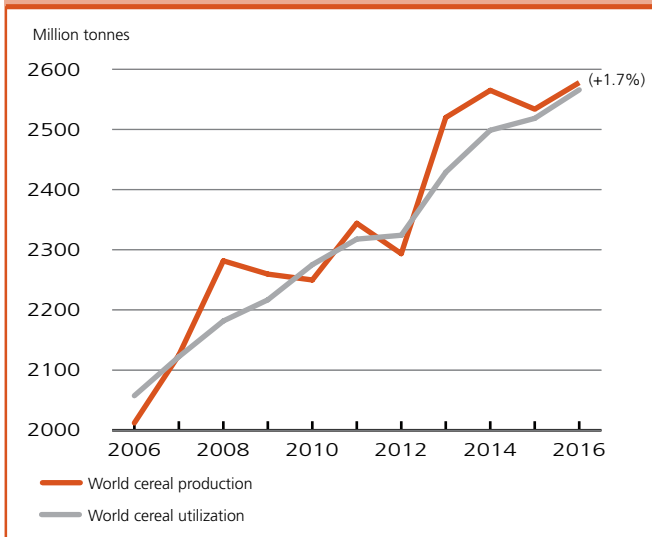
HIGHLIGHTS

- Global cereal production in 2016 received a further boost, owing to generally favourable growing conditions for the crops harvested later in the season.
- **COUNTRIES IN NEED OF EXTERNAL ASSISTANCE:** FAO estimates that 39 countries, including 28 in Africa, are in need of external assistance for food, six more than the corresponding period in 2015. Continued conflicts and weather-related shocks are the main causes of intensified food insecurity in 2016.
- **AFRICA:** Dry-weather-reduced outputs in North and Southern Africa more than outweighed production gains in East and West Africa, resulting in an overall reduced aggregate cereal production in 2016. The low harvests in Southern Africa severely stressed food security conditions, while conflicts, notably in Nigeria and in South Sudan, continued to severely erode productive capacities and acutely intensified food insecurity in the affected areas.
- **ASIA:** A sharp recovery in India's output is mostly behind the strong 2016 production rebound in the Far East, while beneficial weather also boosted the production of the Asian CIS subregion. Several Near Eastern countries continued to be severely affected by the negative impact of conflicts on agriculture, livelihoods and food security, which adversely impacted the outcomes of the 2016 cereal harvest despite generally beneficial weather.
- **LATIN AMERICA AND THE CARIBBEAN:** Drought-reduced crops in Bolivia (Plurinational State of), Brazil and Paraguay caused a sharp cut in the 2016 aggregate South American cereal output, while production recoveries are expected in most Central American countries, following last year's drought-reduced harvests. Early prospects for the 2017 crop in South America are positive, based on expectations of an expansion in plantings and a favourable start to the cropping season.

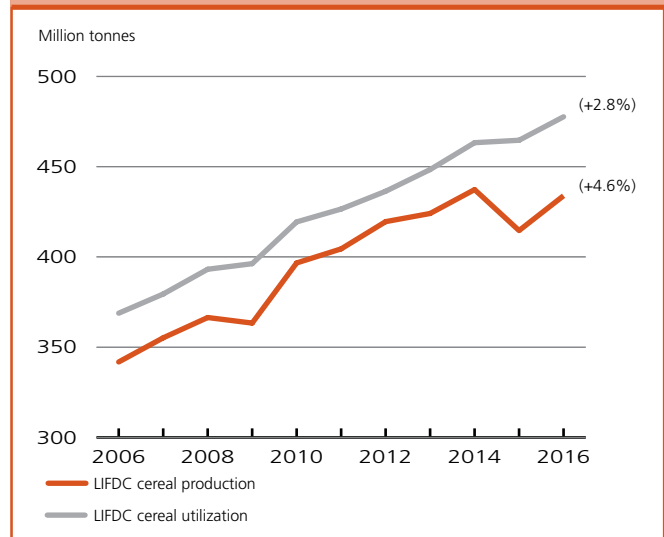
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Global cereal production in 2016 received a further boost after better than expected outputs of later harvested crops

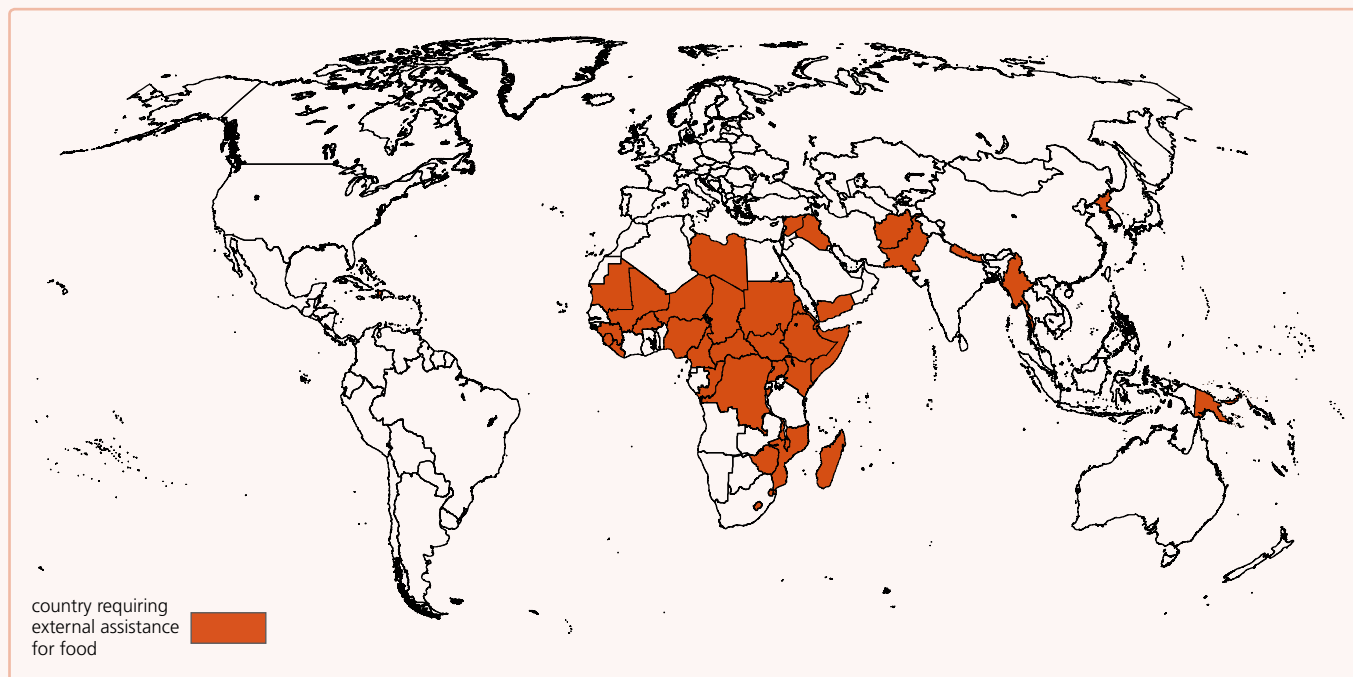


Larger crops in India and West Africa drive up LIFDC cereal production in 2016



Countries requiring external assistance for food¹

World: 39 countries



AFRICA (28 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- The Internally Displaced Person (IDP) caseload, which declined earlier in 2016 following a relative improvement of the security situation in some areas of the country, increased by about 36 000 in October, and was estimated at about 421 000. About 2 million people (40 percent of the total population) are in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") as a result of three consecutive years of reduced harvests and food access constraints due to market disruptions and declining purchasing power.

Malawi

Significant cereal production decline in 2016 and higher food price

- An estimated 6.5 million people are in need of humanitarian assistance, on account of the sharply reduced maize harvest in 2016 and higher food prices.

Zimbabwe

Steep declines in cereal production in 2016

- An estimated 33 percent (approximately 3 million people) of the rural population are food insecure, and this number is projected to rise to 44 percent (4.07 million people) during the peak of the lean period between January and March 2017, approximately 44 percent higher than the corresponding period in the first quarter of 2016.
- The worsening food security situation reflects the impact of the El Niño-induced drought that caused a sharp reduction in the 2016 agricultural output.

WIDESPREAD LACK OF ACCESS

Burundi

Civil insecurity and economic downturn

- Disruptions to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions of households, especially in Kirundo, Muyinga, Rutana and Makamba provinces, as well as rural areas near Bujumbura.
- About 1.46 million people are estimated to be severely food insecure.

Chad

Population displacements and civil insecurity

- Approximately 388 000 refugees, 112 000 IDPs, as well as an estimated 95 000 Chadian returnees, continue to add pressure on local food supplies, negatively affecting food security.
- About 456 000 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis.

Democratic Republic of the Congo

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

- As of late September 2016, the IDP caseload was estimated at 1.9 million, 100 000 more than the previous estimates in late April. An estimated 6 million people are in acute food insecurity and livelihood crisis (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). The country hosts 96 500 refugees from the Central African Republic, 60 300 from South Sudan and 33 900 from Burundi.

Djibouti

Lingering effects of unfavourable rainy seasons on pastoral livelihoods

- About 194 000 people are severely food insecure, down from the previous estimate, mainly concentrated in pastoral inland areas of Dikhil Region.

Eritrea

Economic constraints have increased the population's vulnerability to food insecurity

Ethiopia

Lingering effects of the previous year's severe drought on local livelihood systems

- About 9.7 million people are severely food insecure, mainly in eastern areas of Oromia, Amhara and Tigray regions as well as in Afar and northern Somali regions.

Lesotho

Drought-reduced 2016 production and higher food prices

- An estimated 709 394 people are food insecure, reflecting the impact of the cereal production decline in 2016 and higher prices.

Mozambique

Drought-affected 2016 production and higher food prices

- Drought conditions resulted in lower cereal outputs in southern provinces and in parts of central provinces, while higher prices are adversely impacting food access.
- Nearly 2 million people are food insecure and require humanitarian assistance.

Niger

Population displacements and civil insecurity

- More than 833 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- Approximately 61 000 Malian refugees are estimated to be living in the country.
- Almost 327 000 people, mostly in the southeast Diffa Region have been displaced due to fear of attacks.

Nigeria

Economic downturn, steep depreciation of the local currency, population displacements and severe insecurity in northern areas

- More than 8 million people are estimated to be food insecure, of which a significant number are in need of emergency food assistance, according to the latest "Cadre Harmonisé" analysis. Despite the generally favourable crop prospects in the key-producing regions of the north, the sharp depreciation of the Naira, coupled with persisting civil conflict in northern states has continued to disrupt market activities and keep prices at near record highs.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Over 3.4 million people are severely food insecure, mainly in the conflict-affected states of Jonglei, Unity and Upper Nile, but also in traditional surplus-producing areas of Greater Bahr el Ghazal and Greater Equatoria regions due to insecurity, trade disruptions and high prices.

Swaziland

Reduced cereal output following drought conditions

- An estimated 638 251 people in need of assistance, reflecting the impact of the drought-reduced 2016 harvest and livestock losses. Higher food prices are further affecting the food security conditions.

SEVERE LOCALIZED FOOD INSECURITY**Burkina Faso**

Refugees putting strain on host communities and lingering impact of reduced 2015 harvest

- Over 32 000 Malian refugees are estimated to be living in the country.
- About 153 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Cameroon

Influx of refugees putting strain on host communities, displacements

- The number of refugees from the Central African Republic, who mainly entered East, Adamaoua and North regions, was estimated in October at 274 000. In addition, about 86 000 refugees from Nigeria have entered the Far North and North regions since May 2013. Insecurity along the borders with Nigeria also led to the internal displacement of 200 000 individuals.
- The number of food insecure people is currently estimated at 2.6 million, more than twice the level in June 2015.

Congo

Influx of refugees straining the already limited resources of host communities

- As of late October 2016, about 29 300 refugees from the Central African Republic are sheltering in the country.

Guinea

Lingering impact of the Ebola Virus Disease (EVD) outbreak

- All neighbouring countries have re-opened their borders with Guinea, which has led to a significant increase in trade flows.
- About 51 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Kenya

Adverse weather on crops production during the first semester of 2016

- About 1.25 million people are severely food insecure, mainly located in southeastern and coastal areas, following the negative impact of poor 2016 "long-rains" on crops production.

Liberia

Lingering impact of the Ebola Virus Disease (EVD) outbreak

- The country is hosting more than 20 000 refugees as of end-May 2016, most of them from Côte d'Ivoire.
- About 53 000 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis.

Madagascar

Severe drought conditions in southern areas

- Drought conditions in southern regions caused a sharp decrease in the 2016 cereal harvest from an already below-average 2015 output, resulting in severe food insecurity conditions; approximately 850 000 people require humanitarian assistance in Androy, Anosy and Astimo Andrefana. Higher food prices have also exacerbated the situation.
- At the national level, rice production in 2016 was estimated to have remained below average, but marginally up on last year's level.

Mali

Population displacements and civil insecurity in northern areas

- An estimated 37 000 people have been internally displaced in the country mostly residing in Timbuktu, the most affected region.
- About 177 000 people, located mostly in Timbuktu, Mopti and Bamako regions, are estimated to be in Phase 3: "Crisis" and above, according to the last "Cadre Harmonisé" analysis.

Mauritania

Refugee caseload continues to put additional pressure on local food supplies

- About 42 000 Malian refugees remain in southeastern Mauritania in the Mbeera camp.
- Over 119 000 people are estimated to be in Phase 3: "Crisis" and above, according to the last "Cadre Harmonisé" analysis.

Sierra Leone

Lingering impact of the Ebola Virus Disease (EVD) outbreak

- About 159 000 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis.

Somalia

Conflict, civil insecurity and localized drought conditions

- About 1.1 million people are estimated to be in need of emergency assistance, mainly IDPs and drought affected agro-pastoral communities in northern regions.

Sudan

Conflict and civil insecurity

- An estimated 3.6 million people are in need of humanitarian assistance, mainly IDPs and host communities in conflict affected areas.

Uganda

Below-average crop production

- About 393 000 people in Karamoja region are estimated to be severely food insecure following consecutive seasons of reduced agricultural outputs.

ASIA (9 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Worsening civil conflict

- Agricultural production is significantly affected by conflict; the 2016 wheat production estimated at 1.5 million tonnes, 55 percent less than the pre-crisis average (2007-2011).
- About 9.4 million people continue to require food assistance.
- Although some international food assistance is being provided, Syrian refugees are also putting strain on other host communities in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low agricultural output and economic downturn

- Heavy rains in late August and early September 2016 reportedly caused localized floods across northeastern parts of the country, resulting in damage to arable land, housing and infrastructure. These areas were also negatively impacted by the floods in August 2015.
- Despite an expected partial recovery in the 2016 aggregate food production, supplies remain tight and 18 million people remain dependent on Government-distributed food rations.
- Given the overall tight supply situation, most households are anticipated to continue to experience borderline or poor food consumption rates.

Yemen

Conflict, poverty, and high food and fuel prices

- According to the IPC analysis of June 2016, out of the 14.12 million food insecure people (9.4 percent higher than the previous year), about 7 million were in IPC Phase: 4 "Emergency", while 7.1 million were in IPC Phase: 3 "Crisis". The current numbers are likely to be higher.
- A below-average cereal harvest expected in 2016 but abundant rainfall had positive effects on livestock production.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Continuing conflict and population displacement

- According to the IPC analysis of April 2016, 8.4 million people are classified in an acute food insecurity crisis and emergency situation. The most food insecure population are in Ghor, Badakhshan, Nuristan and Nangarhar provinces.
- Changes in refugee policies in Pakistan have led to steep increases in returnees: up to 400 000 undocumented returnees and around 200 000 documented returnees will arrive in Afghanistan by the end of 2016 putting strain on the limited local resources, particularly in the eastern province of Nangarhar.

Iraq

Security related uncertainties disrupt distribution systems

- Over 2 million people have been displaced since January 2014.
- Some 1.8 million beneficiaries (IDPs, non-displaced food insecure in conflict areas and food insecure host families) are receiving food assistance.

Libya +

Security related uncertainties disrupt distribution systems

- The number of people in need of food assistance is estimated at 0.4 million, with refugees, asylum seekers and internally displaced among the most vulnerable.
- Food shortages are reported mostly in the south and east where basic food items, including wheat, bread, flour, pasta, oil, milk and fortified blended foods for children are in short supply. Access to subsidized food among the affected population is limited.

Myanmar

Impact of floods for a second consecutive year and renewed conflict in northern parts of Rakhine State

- Floods in 2016 severely affected an estimated 500 000 people.
- Households in Chin and Rakhine states still remain highly vulnerable, as they have not yet recovered from the impact of last year's floods.
- Around 30 000 people are estimated to have been displaced following the escalation of the conflict in northern parts of Rakhine State since early October 2016. Around 162 000 people are estimated to be food insecure with at least 78 000 in urgent need of food.

Nepal

Lingering impact of the 2015 earthquake and localized floods in 2016

- An earthquake struck the country in April 2015, mostly impacting central and western parts and resulting in the loss of nearly 9 000 lives.
- Despite overall improved prospects for 2016 cereal production, localized flooding in several locations have caused some damage to the summer crops.

Pakistan +

Population displacement and localized cereal production shortfalls

- As of October 2016 an estimated 1.3 million Afghan refugees remain displaced in northern Pakistan, due to recurrent insecurity.
- In Tharparkar District and the surrounding areas of Sindh Province, the drought-affected cereal production and the loss of livestock for the third consecutive year has aggravated food insecurity and caused acute malnutrition.

LATIN AMERICA AND THE CARIBBEAN (1 country)**SEVERE LOCALIZED FOOD INSECURITY****Haiti** +

An estimated 1.4 million people are in need of immediate humanitarian assistance, due to the impact of Hurricane Matthew that struck the country in early October 2016

- Grand'Anse, Nippes and Sud were the most affected departments.

OCEANIA (1 country)**SEVERE LOCALIZED FOOD INSECURITY****Papua New Guinea**

Lingering impact of weather events on agricultural production

- Severe localized staple food production shortfalls in 2016, following the prolonged drought linked to the 2015/16 El Niño episode, are expected to worsen the food insecurity situation of vulnerable groups, particularly in the Highlands Region.

Countries with unfavourable prospects for current crops² (total: 4 countries)**AFRICA (3 countries)****Central African Republic**

Widespread conflict, which caused large-scale displacements, the loss and depletion of households' productive assets and input shortages, continues to weigh on 2016 production prospects

Kenya +

Late and erratic October-to-December rains severely affected prospects for 2016 "short-rains" season crops in southern and coastal lowland areas

Somalia +

Late and erratic October-to-December rains severely affected prospects for 2016 "deyr" season crops in most southern and central areas

ASIA (1 country)**Timor-Leste**

Cereal production prospects indicate a reduced 2016 crop for the second consecutive year

Key - New Entry +**Terminology**

¹ **Countries requiring external assistance for food** are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:

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

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

Global Production Overview¹

CEREALS 2016

FAO's latest forecast for 2016 world cereal production stands at 2 578 million tonnes, 1.7 percent (44 million tonnes) above last year's output, mainly resting on larger maize and, to a lesser extent, wheat crops.

COARSE GRAINS 2016

Global coarse grains production in 2016 is forecast at 1 330 million tonnes, 1.7 percent (22.7 million tonnes) higher than the previous year. Most of this year's rise is accounted for by a larger global maize output, forecast at 1 027 million tonnes, 2.1 percent (21.4 million tonnes) above the level in 2015. The bulk of this increase is reflective of yield-driven growth for **the United States of America's** output, estimated at a record high. Notable year-on-year production gains are also estimated in the **European Union**, **India** and **Ukraine**, largely resulting from improved weather conditions that boosted yields. These increases more than offset reductions in **Brazil** and *Southern African* countries due to El Niño-related dry weather, as well as in **China (Mainland)**, where the removal of high support prices prompted farmers to shift away from maize cultivation.

Global production of barley in 2016 is forecast at 145 million tonnes, 1.7 percent (2.5 million tonnes) down on the previous year. The decrease is almost entirely on account of lower productions in **Morocco** and **Turkey** resulting from dry weather. Contractions in output are also expected in **Argentina** and

the United States of America. These reductions are expected to more than outweigh the small production gains estimated in **Australia**, **the Russian Federation** and **Ukraine**.

The forecast for world sorghum production stands at 63.8 million tonnes in 2016, virtually unchanged from the previous year. Larger outputs in **India** and **the Sudan** are anticipated to offset a near 3.4-million-tonne cut in the forecast for **the United States of America's** production.

WHEAT 2016

With the bulk of the wheat crop already harvested, FAO's forecast for world wheat production in 2016 stands at 749 million tonnes, 1.9 percent (14 million tonnes) more than in 2015. The larger output mostly reflects production gains in *North America*, where favourable weather boosted yields in **the United States of America** and **Canada**, resulting in a combined 10-million-tonne year-on-year increase. Large production gains are also

Table 1. World cereal production¹
(million tonnes)

	2014	2015 estimate	2016 forecast	Change: 2016 over 2015 (%)
Asia	1 116.1	1 118.6	1 128.2	0.9
Far East	1 019.8	1 014.2	1 023.9	1.0
Near East	64.4	70.5	67.5	-4.2
CIS in Asia	32.0	33.9	36.7	8.4
Africa	175.9	168.9	161.6	-4.3
North Africa	33.1	37.3	28.7	-23.0
West Africa	52.6	54.1	56.3	3.9
Central Africa	4.7	4.5	4.5	1.1
East Africa	51.6	46.1	48.7	5.5
Southern Africa	34.0	26.8	23.4	-12.6
Central America and Caribbean	42.0	40.4	42.9	6.4
South America	179.1	186.4	169.6	-9.0
North America	491.3	482.9	531.7	10.1
Europe	523.7	498.3	500.9	0.5
European Union	330.6	313.3	299.5	-4.4
CIS in Europe	178.5	172.4	188.6	9.4
Oceania	36.9	38.4	43.0	11.9
World	2 565.0	2 533.8	2 577.9	1.7
Developing countries	1 454.8	1 458.8	1 446.3	-0.9
Developed countries	1 110.1	1 075.0	1 131.6	5.3
- wheat	730.5	735.1	749.3	1.9
- coarse grains	1 339.8	1 307.3	1 330.0	1.7
- rice (milled)	494.7	491.4	498.5	1.5

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

¹ For further information please see FAO's latest global [Cereal Supply and Demand Brief](#) and the [Food Price Monitoring and Analysis Bulletin](#).

estimated in **the Russian Federation**, and in **India** where record yields more than compensated for a cut in plantings, while **Australia** is forecast to gather its largest crop in five years. Significant production declines are estimated in the **European Union**, with the wheat output falling by 16.5 million tonnes on a yearly basis, and in **Morocco** due to dry weather that caused a steep cutback in the domestic output to a well-below average level.

RICE 2016

FAO's forecast of world rice production in 2016 now stands at an all-time high of 498.5 million tonnes (milled basis). This level would represent a 7.2-million-tonne annual upturn, marking the first global production expansion since 2013. Much of the expected growth would reflect a 1.5 percent recovery in *Asia's* production to 450.7 million tonnes, mirroring the positive impact of the more normal weather patterns that followed the dissipation of the El Niño weather phenomenon midway through the year. The bulk of the growth would rest on an increase in **India**, although sizeable contributions are also likely to come from **China (Mainland)**, **Nepal**, **the Philippines** and **Thailand**.

Despite some flooding problems, growing conditions have also proven conducive across Northern Hemisphere *Africa*, where the rice output is seen at a fresh peak of 19.8 million tonnes. By contrast generally poor results were estimated in southern parts of *Africa*, where crops were adversely impacted by poor rains. The outlook is more subdued for *Latin America and the Caribbean*, as a combination of unfavourable weather and prospects of reduced margins depressed output in several South American producers, most notably **Brazil**. As a result, 2016 production in the region is seen at a five-year low of 17.7 million tonnes. In *North America*,

notwithstanding disruptions posed by extensive August floods, production in **the United States of America** is set to rebound to its second highest on record, as poor margins for competing crops instigated a surge in plantings. Elsewhere in the world, prospects are positive for the **European Union** and **the Russian Federation**, owing to a generally conducive growing climate, which would more than compensate for a slump in production in **Australia** linked to insufficient and costly water supplies for irrigation.

CEREALS 2017

Looking further ahead, in the Northern Hemisphere, planting of the 2017 winter wheat crop in the **European Union** is nearly complete under generally good

conditions, with the crop entering dormancy in northern parts. In **the United States of America**, although beneficial weather has improved crop conditions compared to the same period last year, low price prospects are likely to have resulted in a contraction in area planted. In **the Russian Federation** and **Ukraine**, the 2017 production outlook is mostly favourable on account of beneficial weather and increased plantings. In **India** and **Pakistan**, early projections point to a larger 2017 crop, as improved water availability for the mainly irrigated wheat crop is expected to have instigated an expansion in plantings. The outlook in **China (Mainland)** is similarly positive, as good weather conditions facilitated fieldwork and benefited the establishment of the early-planted wheat crop.

Table 2. Basic facts of world cereal situation
(million tonnes)

	2014/15	2015/16 estimate	2016/17 forecast	Change: 2016/17 over 2015/16 (%)
PRODUCTION¹				
World	2 565.0	2 533.8	2 577.9	1.7
Developing countries	1 454.8	1 458.8	1 446.3	-0.9
Developed countries	1 110.1	1 075.0	1 131.6	5.3
TRADE²				
World	378.7	396.2	388.5	-2.0
Developing countries	115.4	132.0	118.6	-10.2
Developed countries	263.3	264.2	269.9	2.1
UTILIZATION				
World	2 498.6	2 518.4	2 565.9	1.9
Developing countries	1 607.9	1 634.3	1 655.6	1.3
Developed countries	890.7	884.1	910.2	2.9
Per caput cereal food use (kg per year)	148.8	148.7	148.8	0.1
STOCKS³				
World	655.8	661.2	670.4	1.4
Developing countries	490.5	494.7	476.6	-3.6
Developed countries	165.3	166.5	193.7	16.3
WORLD STOCK-TO-USE RATIO (%)	26.0	25.7	25.6	-0.7

Note: Totals and percentage change computed from unrounded data.

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

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

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

In the Southern Hemisphere, the 2017 summer cereal crop is being sown. Maize plantings in **Argentina** and **Brazil** are forecast to increase, as prospects of improved returns have encouraged farmers to expand sowings, with favourable weather further boosting

the production outlook. In **South Africa**, favourable weather conditions continue to point to a strong production rebound from the drought-reduced 2016 maize harvest, with 2017 maize plantings forecast to increase by nearly one-third over last year's level. With a

few exceptions, sowing operations of the 2017 paddy crops have similarly progressed favourably across the Southern Hemisphere, with expectations of increased area and yield improvements relative to last year's El Niño depressed levels.

Low-Income Food-Deficit Countries Food Situation Overview²

Higher outputs in West Africa and India further augment cereal production of LIFDCs in 2016

FAO's latest forecast for the aggregate cereal production of Low-Income Food-Deficit Countries (LIFDCs) in 2016 has been revised upward by 1 percent (4.4 million tonnes) since the previous issue of this publication in September, to 433.9 million tonnes, implying a near 20-million-tonne increase on a yearly basis. The recent increase is reflective of upward adjustments to the forecasts in *West African* countries and in **India**.

The aggregate production estimate for LIFDCs in *sub-Saharan Africa* stands at 117.7 million tonnes in 2016, 3.4 percent higher than the previous year's level. Improved cereal harvests in *East* and *West Africa* are mainly behind this year's larger crop, mostly reflective of beneficial weather conditions that boosted yields, with large increases forecast in **Mali** and the **Sudan**. In *Central Africa* cereal production is anticipated to remain unchanged and at near-average levels in 2016, as conflicts continued to contain and depress production despite generally beneficial weather. In *Southern Africa*, with the main harvest concluded earlier in the year, 2016 production is estimated to be sharply down from the five-year average due to El Niño-related dryness.

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

	2014/15	2015/16 estimate	2016/17 forecast	Change: 2016/17 over 2015/16 (%)
Cereal production¹	437.3	414.6	433.9	4.7
<i>excluding India</i>	192.9	185.7	190.1	2.3
Utilization	463.3	464.6	477.7	2.8
Food use	370.9	375.8	383.0	1.9
<i>excluding India</i>	178.5	182.5	186.1	2.0
Per caput cereal food use (kg per year)	146.6	145.9	146.1	0.1
<i>excluding India</i>	144.5	144.3	143.8	-0.3
Feed	36.1	35.7	36.5	2.3
<i>excluding India</i>	21.5	21.0	21.1	0.5
End of season stocks²	93.9	82.5	78.1	-5.3
<i>excluding India</i>	41.6	39.8	38.5	-3.1

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

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

Table 4. Cereal production¹ of LIFDCs (million tonnes)

	2014	2015 estimate	2016 forecast	Change: 2016 over 2015 (%)
Africa (37 countries)	119.7	113.8	117.7	3.4
East Africa	51.5	46.1	48.6	5.5
Southern Africa	11.0	9.1	8.3	-8.7
West Africa	52.6	54.1	56.2	3.9
Central Africa	4.6	4.4	4.5	1.2
Asia (12 countries)	316.1	299.5	314.4	5.0
CIS in Asia	10.5	10.2	10.2	-0.1
Far East	295.6	279.4	295.5	5.8
- India	244.4	228.9	243.8	6.5
Near East	10.0	9.9	8.7	-11.9
Central America and the Caribbean (3 countries)	1.5	1.2	1.7	40.8
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (54 countries)	437.3	414.6	433.9	4.7

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

² The **Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011). The current list of the LIFDCs stands at 54 countries, one country less than in 2014 list but with some changes. The Congo, the Philippines and Sri Lanka all graduated out based on income criterion (for the Philippines in particular partly due to the World Bank revision of income data). The 2015 list of LIFDCs also includes South Sudan, for which data were previously unavailable, and the Syrian Arab Republic, which was previously taken off the list, but now does not satisfy the three criteria for exclusion. For full details see: <http://www.fao.org/countryprofiles/lifdc/en/>

Aggregate production of LIFDCs in *Asia* is forecast at 314.4 million tonnes, up 5 percent (14.9 million tonnes) compared to the level in 2015. The bulk of this year's increase stems from a 15-million-tonne recovery in **India's** output, reflecting normal monsoon patterns that resulted in a rebound in yields to average levels. Small production gains are expected elsewhere in the subregion, notably in **Nepal** and similarly due to weather-augmented yields. In the *Near East*, production is forecast to be well below the five-year average and slightly down from 2015. Despite generally favourable weather, the conflicts in

Afghanistan, the Syrian Arab Republic and **Yemen** continued to severely undermine the agriculture sector.

Larger requirements in Southern Africa boosts aggregate LIFDC import forecast in 2016/17

The forecast for aggregate cereal imports by LIFDCs in the 2016/17 marketing year points to a 1.4 percent increase compared to the previous year, mostly reflecting higher needs in *Southern Africa* following the sharp production decline in 2016. Imports by LIFDCs in *West* and *Central Africa* are also foreseen to

rise moderately, while in *East Africa* the favourable production outlook contained increases. In *Asia*, cereal imports are expected to decline in *Far East* and *CIS Asian* countries, as a result of recoveries in domestic outputs. In the *Near East* the conflict continues to constrain import capacities, although food aid needs are likely to rise. In *Central America*, the partial recovery in cereal production this year is expected to instigate a drop in import needs.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

	2014/15 or 2015	2015/16 or 2016		2016/17 or 2017	
	Actual imports	Import forecast	of which food aid	Import requirement ¹	of which food aid
Africa (37 countries)	32 326	32 159	1 245	33 557	1 021
East Africa	10 459	10 671	873	10 551	702
Southern Africa	2 718	2 891	37	4 033	42
West Africa	17 247	16 827	178	17 032	119
Central Africa	1 903	1 770	156	1 941	157
Asia (12 countries)	19 601	22 894	803	22 490	809
CIS in Asia	4 138	4 387	1	4 241	1
Far East	6 455	8 335	201	8 132	198
Near East	9 007	10 172	602	10 117	610
Central America and the Caribbean (3 countries)	1 973	2 248	37	2 080	14
Oceania (2 countries)	473	481	0	470	0
Total (54 countries)	54 372	57 782	2 085	58 597	1 843

Note: Totals computed from unrounded data.

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

Regional reviews

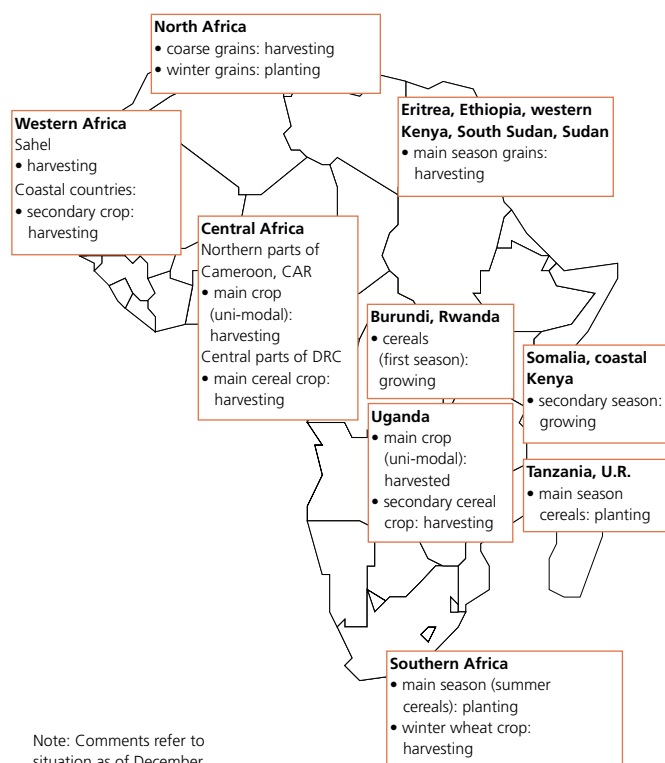
NORTH AFRICA

Favourable planting conditions for 2017 winter crops

Planting of the 2017 winter wheat and coarse grains crops is underway with favourable rains benefiting early crop establishment and easing drought conditions in western **Algeria**. Although the showers in November ensured sufficient soil moisture for winter grain establishment, parts of **Morocco** remained affected by drier conditions. Most planting activities are usually carried out in November.

Below-average cereal output gathered in 2016

Latest estimates indicate an aggregate 2016 cereal output (including paddy rice) of 30.7 million tonnes, almost 22 percent down from last year's above-average output and 18 percent below the five-year average. Total 2016 wheat production decreased by almost 28 percent on year-on-year basis to 15.1 million tonnes, while the coarse grain harvest is estimated at 9.3 million tonnes, about 20 percent below the five-year average and about 25 percent lower than the previous year. The biggest year-on-year decline in wheat production is recorded in **Morocco**, where only 2.7 million tonnes of wheat were harvested compared to 8 million tonnes in 2015. This decrease is mainly on account of poor rains that delayed planting activities, reduced the area sown and significantly restricted yields. In **Algeria**, cereal production decreased by some 20 percent on a yearly basis, following a loss of about one-third of the area planted (almost 1 million hectares) due to water deficits. Production in **Tunisia** and **Egypt** remained at a similar level to last year's harvest, which, in the case of Tunisia, was below average.



Cereal import requirements remain above average in 2016/17

With a significantly below-average 2016 harvest, the subregion's aggregate cereal import requirement (of which wheat accounts for about 60 percent) for the 2016/17 marketing year (July/June), is estimated at approximately 51.1 million tonnes, 17 percent above the average of the previous five

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
North Africa	18.0	20.9	15.1	10.7	12.3	9.3	6.3	5.9	6.3	35.0	39.1	30.7	-21.6
Algeria	1.9	2.8	2.2	1.3	1.3	1.1	0.0	0.0	0.0	3.2	4.1	3.3	-19.5
Egypt	9.3	9.0	9.0	6.6	6.8	6.8	6.2	5.9	6.3	22.1	21.7	22.1	1.9
Morocco	5.1	8.0	2.7	1.9	3.7	0.8	0.0	0.0	0.0	7.0	11.7	3.5	-69.8
Tunisia	1.5	0.9	1.0	0.8	0.4	0.4	0.0	0.0	0.0	2.3	1.3	1.4	9.0

Note: Totals and percentage change computed from unrounded data.

years. A larger increase in import requirements was limited by ample carryover stocks from the 2015 above-average harvest, particularly in **Morocco**. At 21.1 million and 13.6 million tonnes, respectively, cereal import requirements in **Egypt** and **Algeria** are about the same as in the previous year. The below average 2016 harvest in **Morocco** increased the forecast for cereal imports to 8.5 million tonnes (16 percent above 2015/16), while a slightly improved crop in **Tunisia** decreased the import requirement by about 4 percent compared to last year.

Decreases in food price inflation, except in Libya

In September and October 2016, decreases in the annual food inflation rates were recorded in **Algeria** (1 percent in September 2016, down from 3.7 percent in August 2016), **Morocco** (2.3 percent in October 2016, down from 4 percent in September 2016), **Tunisia** (2.7 percent in October 2016, down from 3.4 percent one month earlier), and **Egypt** (13.8 percent in October 2016, down from 14.8 percent in September 2016). Following the sharp currency depreciation in **Egypt** in early November 2016, increases in inflation are expected. In **Libya**, in the first half of 2016, inflation increased to 25.3 percent compared to 8.7 percent for the same period in 2015 and 9.8 percent in the entire 2015 due to insecurity-induced supply chain disruptions and a weakening dinar.

Some 400 000 people in Libya in need of food assistance

According to the Libya Humanitarian Needs Overview report (issued in November 2016), the total number of people in need of humanitarian assistance is estimated at 1.3 million, or 20 percent of the affected population, with most severe cases reported in Aljfarah, Tripoli and Benghazi. Of these, an estimated 0.4 million people need food assistance. Refugees, asylum seekers and internally-displaced are among the most vulnerable. Food shortages have been reported mostly in southern and eastern parts of the country, where most basic food items, including wheat, bread, flour, pasta, oil, milk and fortified blended foods for children, are in short supply. Access to subsidized food among the affected population is also limited.

WEST AFRICA

Record 2016 cereal harvest expected in the Sahel

The 2016 coarse grains harvest is nearly complete in the Sahel, while in coastal countries along the Gulf of Guinea harvesting of the second season cereal crops has just started. The Joint Inter-Agency Crop Assessment Missions (CAMs) to the nine Sahelian countries (Burkina Faso, Cabo Verde, Chad, the Gambia, Guinea-Bissau, Mali, Mauritania, Niger and Senegal) and eight coastal countries (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) have recently been concluded. The missions reviewed the evolution of the 2016 cropping season and assessed the preliminary cereal production estimates prepared by the national agricultural statistics services. FAO participated in several of these missions. According to the preliminary findings, a record cereal output is anticipated in the Sahelian countries following beneficial rains since July over the main producing areas. Record cereal outputs are forecast in **Mali**, **Niger** and **Senegal**, while a near-record production is expected in **Burkina Faso**. Significantly above-average harvests are anticipated in all other Sahel countries except **the Gambia** and **Mauritania**. The 2016 aggregate cereal production of the nine Sahel countries was estimated at around 25 million tonnes, 10 percent above the 2015 level and 23 percent above average. Similarly, in coastal countries along the Gulf of Guinea, crops benefited from favourable weather conditions during the sowing and vegetative periods. As a result, above-average cereal harvests are expected in most coastal countries including **Nigeria** where the aggregate cereal output is forecast to remain close to last year's above-average level. The Boko Haram conflict has however had a significant impact on the agricultural sector in the northeast due to large-scale population displacements that led to a sharp drop in plantings in the affected areas, notably in Borno State.

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
West Africa	43.6	44.9	46.4	14.0	14.3	15.3	57.7	59.4	61.8	4.1
Burkina Faso	4.1	3.9	4.4	0.3	0.3	0.4	4.5	4.2	4.7	12.3
Chad	2.4	2.2	2.6	0.3	0.2	0.3	2.7	2.5	2.8	14.7
Ghana	2.2	2.1	2.1	0.6	0.6	0.7	2.8	2.8	2.8	2.9
Mali	4.8	5.7	6.1	2.2	2.3	2.8	7.0	8.1	9.0	11.1
Niger	4.8	5.2	5.7	0.1	0.1	0.1	4.9	5.4	5.9	9.2
Nigeria	19.5	19.2	18.8	4.9	4.8	5.0	24.4	24.0	23.9	-0.8

Note: Totals and percentage change computed from unrounded data.

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

However, the decline in production in the northeast was offset by favourable weather and increased production in non-affected states. The aggregate cereal harvest in *West Africa* is expected to be about 12 percent above the average of the previous five years, mostly reflecting the record crops in the Sahelian countries.

Cereal prices stable or declining and generally at low levels, except in Nigeria

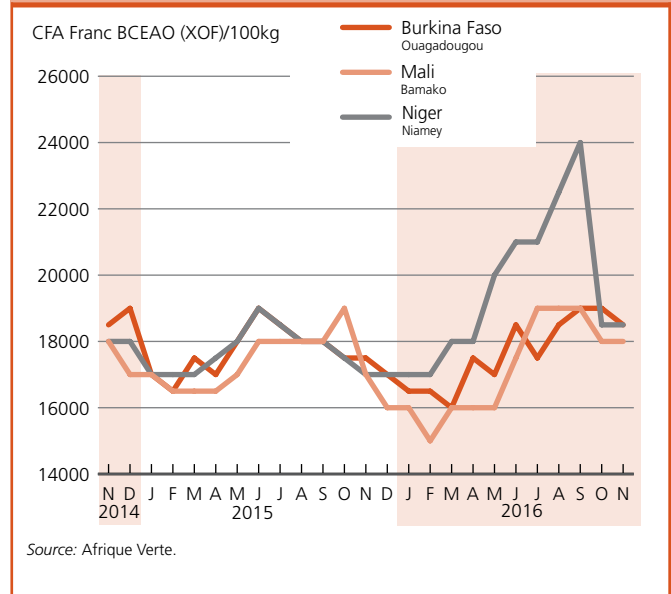
In the Sahel, coarse grain prices remained unchanged or declined in October and November, reflecting increased supplies from the 2016 harvests and adequate carryover stocks from last year's production. In **Burkina Faso** and **Mali**, millet and sorghum prices were stable or declined in November but remained slightly above their year-earlier levels. In **Niger**, coarse grain prices dropped steeply in most markets, notably millet prices in the capital, Niamey, which declined by about 18 percent in the two months to November. Prices, however, remained at levels well above those of a year earlier after sustained increases in the previous months, with seasonal trends exacerbated by concerns about crop performance in some areas. In **Chad**, coarse grain prices declined or remained stable in October, but were well below their levels of a year earlier reflecting adequate regional supplies and imports from neighbouring countries as well as favourable prospects for the 2016 cereal production.

In coastal countries along the Gulf of Guinea, harvesting of the 2016 first season crops has put significant downward pressure on prices in some countries, particularly in **Benin** and **Togo** where maize prices in most markets declined further in October and were below year-earlier levels. In **Nigeria**, new supplies from the 2016 harvest in the southern part of the country halted the strong upward price trend of the previous months. However, despite the generally favourable 2016 crop prospects in the key-producing regions of the north, a weak currency and civil insecurity that continues to disrupt market activities kept prices at record or near-record highs. The depreciation of the Nigerian naira also continues to affect price trends and trade flows, supporting regional import demand for Nigerian cereals, which has resulted in increased exports to neighbouring countries and consequently exerted significant pressure on domestic food supplies. Moreover, the currency weakness has increased fuel and input costs, and led to reduced imports from neighbouring countries, which is affecting households' income and food security, notably in the Sahelian countries that usually export livestock and cash crops to Nigeria.

Food security affected by civil insecurity

In spite of two consecutive years of above-average cereal harvests, the humanitarian situation remains critical, mainly due to the continuing civil conflict in northern **Nigeria**, which has resulted in large population displacements, both internally

Figure 1. Millet prices in selected West African markets



and in the neighbouring countries of **Cameroon**, **Chad** and the **Niger**. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), about 2 million people have been internally displaced. The conflict has also caused widespread disruption to agricultural and marketing activities. The recent Cadre Harmonisé (CH) analysis held in November 2016, about 8 million people in Nigeria require urgent life-saving and livelihood-saving interventions, including about 6.2 million people in CH Phase 3: "Crisis", about 1.8 million people in CH Phase: 4 "Emergency" and 55 000 people in CH Phase: 5 "Catastrophe". The number of people in need of urgent assistance is projected to increase to 11 million between June and August 2017. Although the population in Phase 4 "Emergency" is spread in five states, the majority or 77 percent are located in the Northern Eastern states and a further 23 percent located in Yobe areas affected by the conflict. The vast majority (96 percent) of the population in CH Phase 5: "Catastrophe" is located in Borno.

Chad has also seen increased numbers of refugees and returnees due to the civil conflict in the Sudan, the Central African Republic, Nigeria and Libya. Overall, about 388 000 refugees are estimated to be living in Chad, while about 95 000 Chadians have returned to their country. The refugee crisis has exacerbated an already fragile food security situation. In the Ebola Virus Disease-affected countries of **Guinea**, **Liberia** and **Sierra Leone**, in spite of the relatively low impact of the outbreak on agricultural production in the previous years, the lingering negative impact on economic activities and livelihoods

continues to affect households' food security. As a result of the shocks mentioned above, the aggregate subregional number of people in Phase 3: "Crisis" and above is estimated to be over 10 million, including 8 million in Nigeria according to the latest "Cadre Harmonisé" analysis.

CENTRAL AFRICA

Average to below-average 2016 cereal harvest forecast, amid continued conflict in some countries

In the **Central African Republic**, the bulk of the cereal harvest was recently concluded except in some areas of the south where harvesting of the secondary season crops has just started. Despite favourable weather conditions, agricultural operations continued to be severely affected by the widespread conflict, which resulted in large-scale population displacements, input shortages and a depletion of households' productive assets. Consequently, a reduced agricultural output for the fourth consecutive year is likely in 2016. To help avert a full-scale nutrition and food security crisis in the coming months and to respond to the needs of the crisis-hit farmers, FAO, along with WFP and Non-Governmental Organization (NGO) partners, have provided, as of October, crop production support to 123 600 vulnerable households (618 000 individuals) across the country, distributing 3 311 tonnes of cereal, groundnuts and sesame seeds and 320 400 tools. In addition, about 850 000 heads of livestock have been vaccinated. In **Cameroon**, harvesting of the 2016 main maize crop was completed in October in central and southern bi-modal rainfall regions, while in northern uni-modal rainfall areas (North and Far North regions), harvesting of millet and sorghum crops was concluded in November. As a result of generally beneficial weather, the national cereal production is expected to be similar to the previous year. However, in the Far North Region, agricultural operations continued to be severely

affected by civil unrest which spread from neighbouring Nigeria in late 2014 and resulted in population displacements, caused input shortages and depleted households' productive assets that were already inadequate due to the recurrent climatic shocks. As a result, the resilience capacity of a large number of households has been eroded, which is likely to cause a second consecutive year of reduced harvests. In the **Democratic Republic of Congo**, harvesting of the main 2016 maize crop has recently been completed in northern areas, while crops in central regions are still at the vegetative stage and will be harvested early next year. In southern uni-modal rainfall areas, planting of the maize crop for harvest from March 2017 is underway under favourable weather conditions. According to remote sensing analysis, vegetation conditions remain favourable in most cropping areas following adequate precipitations. However, early season dryness delayed planting operations in the southernmost Haut Katanga Province. In the **Congo** and **Gabon**, harvesting of the main season maize crop normally starts in December. Crops benefited from a timely onset of seasonal rains in October, except in coastal areas where abnormally dry conditions delayed planting operations. However, in both countries, the bulk of the national cereal requirement is met through imports. FAO's forecast for the subregion points to a 2016 cereal production similar to last year and about 3 percent below the average of the previous five years.

Inflation rates increased in 2016 but still remain low in several countries

In the **Central African Republic**, the inflation rate is forecast to remain at around 4 percent in 2016, similar to the level of the previous year. However, this rate is still above the convergence rate of 3 percent set by the "Communauté économique et monétaire de l'Afrique centrale". In the **Democratic Republic of the Congo**, the inflation is forecast at a slightly higher rate of 1.7 percent in 2016 compared to the previous year, due to the relatively strong economic growth and a loosening of fiscal policy that boosted domestic demand. In Goma market, located in the northeastern North-Kivu Province, prices of cassava flour, the main

staple in northern and central areas, declined by 10 percent between August and October, but were still 33 percent higher than 12 months earlier, partly due to the additional demand from increasing numbers of Burundian refugees. In Lubumbashi market, located in the far south, prices of maize, the main staple in southern areas, have been highly volatile since early 2016 and in October

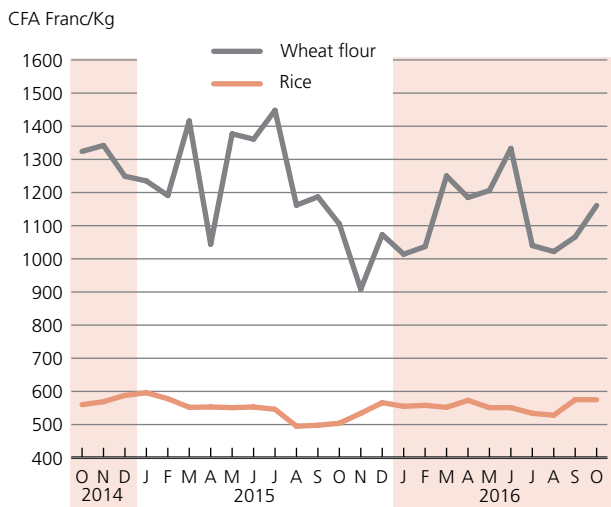
Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
Central Africa	4.3	4.1	4.2	0.6	0.5	0.5	4.9	4.7	4.7	1.1
Cameroon	2.8	2.7	2.7	0.2	0.2	0.2	3.0	2.9	2.9	1.8
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.0
Democratic Republic of the Congo	1.3	1.3	1.3	0.3	0.3	0.3	1.6	1.6	1.6	0.0

Note: Totals and percentage change computed from unrounded data.

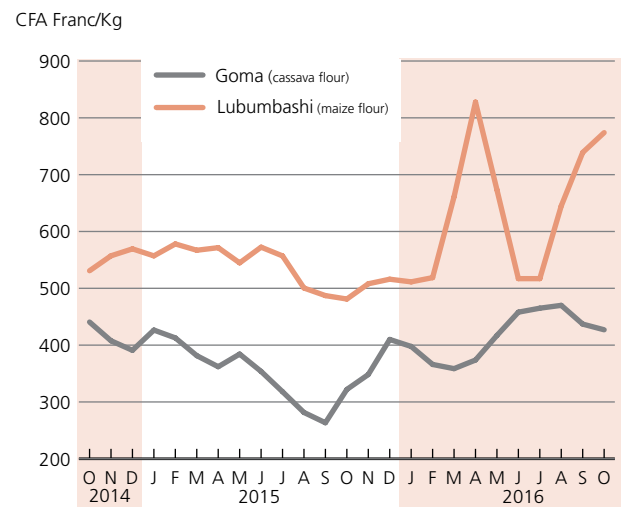
¹ Total cereals includes wheat, coarse grains and rice (paddy).

Figure 2. Retail prices in Libreville, Gabon



Source: Ministère de l'Economie et de la Prospective.

Figure 3. Retail prices of cassava (flour) and maize (flour) in selected Democratic Republic of the Congo markets



Source: Institut National de la Statistique, WFP/VAM

were 60 percent higher than 12 months earlier, mainly due to reduced imports from neighbouring Zambia. In **Gabon**, prices of imported wheat, the most important staple for urban consumers, increased by 14 percent between August and October, when they were 5 percent higher than their year-earlier levels. Prices of imported rice increased by 9 percent in September, subsequently leveling off in October, and were 14 percent higher on a yearly basis. In **the Congo**, the inflation rate is estimated at 4 percent in 2016, as prices of several commodities, including petrol, increased due to the instability in the neighbouring **Democratic Republic of the Congo**, which has disrupted trade flows. For instance, prices of imported rice increased by about 10 percent on a monthly basis in most monitored markets in October. By contrast, in **Cameroon** the inflation rate in 2016 is estimated at 2.2 percent, down from 2.8 percent in the previous year. Prices of locally produced maize, the most consumed cereal, declined by up to 18 percent between June and September reflecting increased supplies from the main season harvest. Maize prices in September were 2-6 percent higher than their year-earlier levels. Prices of imported wheat, mostly consumed in urban areas, were stable and at around their year-earlier levels in recent months in the capital, Yaoundé, and in Douala, the largest urban centre and the main entry port for imports.

Conflict worsens food insecurity in the Central African Republic, Cameroon and parts of the Democratic Republic of the Congo

Continued civil insecurity in **the Central African Republic** and in the eastern Democratic Republic of the Congo has resulted in massive population displacements and hindered access to food

for the affected population. As of October 2016, about 468 500 refugees from **the Central African Republic** have sought refuge in neighbouring **Cameroon** (274 000), **the Democratic Republic of the Congo** (96 500), **Chad** (68 700) and **the Congo** (29 300), straining the already limited resources of the hosting communities. The IDP caseload in **the Central African Republic**, which declined in 2016 following a relative improvement of the security situation in some areas of the country, increased by about 36 000 in October, when it was estimated at about 421 000. The new displacements have been caused by the resurgence of inter-communal violence in Northern Vakaga and northwestern Ouham-Pendé prefectures. Three consecutive years of reduced harvests, compounded by access constraints due to market disruptions and declining purchasing power, resulted in an alarming food security situation. According to the latest Integrated Food Security Phase Classification (IPC), valid for the period from August to December 2016, about 2 million people (40 percent of the total population) are in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). Ten out of sixteen prefectures are in IPC Phase 3: "Crisis", while Vakaga Prefecture, Kabo and Batangafo subprefectures (Ouham Prefecture), Ngaoundaye subPrefecture (Ouham Pendé Prefecture) and Mbrès subPrefecture (Nana-Gribizi Prefecture) are in IPC Phase 4: "Emergency". Similarly, in **the Democratic Republic of the Congo**, the escalation of the civil conflict since 2013, especially in the eastern provinces, has severely damaged local livelihood systems and caused massive population displacements. As of late September 2016, the IDP caseload was estimated at 1.9 million, 100 000 more than the

previous estimate from April. About 40 percent of the displaced population is located in North Kivu and the rest mainly reside in South-Kivu, Maniema and the former Katanga Province. The country also hosts 96 500 refugees from the Central African Republic, 60 300 from South Sudan and 33 900 from Burundi. According to the latest available IPC analysis, in June 2016, the number of people in acute food insecurity and livelihood crisis (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") was estimated at about 5.9 million, about 10 percent less than a year earlier, due to a relative improvement in the security situation in the conflict-affected Tanganyika, Sud-Kivu, Nord-Kivu, Maniema and Ituri provinces, where more than half of the total national food insecure population reside. However, armed clashes in late October-early November in the Dibaya territory (Kasaï Central Province) caused the destruction of standing crops and food stocks and affected about 100 000 individuals, thus bringing the food insecure total caseload to 6 million. In **Cameroon**, as of mid-November 2016, the Far North Region hosted about 86 000 refugees fleeing civil unrest in Nigeria, which has spread into neighbouring countries and has also resulted in the displacement of 200 000 Cameroonians. The number of food insecure people in Cameroon is currently estimated at 2.6 million. The area most affected by food insecurity is the Far North Region, where the caseload is currently estimated at 1.5 million, 100 000 more than the previous estimate in September 2015.

EAST AFRICA

Above-average 2016 cereal output expected despite unfavourable production prospects for "short-rains" season in Somalia, Kenya and parts of Uganda

Harvesting of the 2016 main season cereal crop is well underway in **Ethiopia, the Sudan, South Sudan, western Kenya and Eritrea**, while it has recently started in **Burundi, Rwanda** and southern and central **Uganda**. Production prospects are generally good in major cropping areas of the subregion and the 2016 aggregate cereal output is estimated at about 50 million tonnes, over 5 percent above last year's drought-affected harvest and 10 percent higher than the five-year average. This figure includes a below-average forecast for the secondary season harvests to be gathered early next year in southern and central **Somalia** ("deyr"), southern and coastal lowlands of **Kenya** ("short-rains") and the northern **United Republic of Tanzania** ("vuli"). In these areas, under the influence of La Niña-like conditions, the October-December short rains have so far been late and erratic, with significant negative effects on the planted area and yields of most staple food crops. Even if rains improve during the

remainder of the season, the recovery of crops is very unlikely in these areas and production prospects are highly unfavourable.

In **Ethiopia**, production prospects for the main "meher" season crops are generally favourable in the main western growing areas. However, lower yields are expected in the lowlands of central and eastern Oromia Region and in Southern Nations, Nationalities, and Peoples' Region (SNNPR) along the Rift Valley, where the June-to-September "kiremt" rains have been unfavourable. In bi-modal rainfall areas of SNNPR, the significant delay of the 2016 secondary "belg" harvest prevented the timely preparation of land for "meher" crops, and consequently farmers opted to plant short cycle crops such as wheat, teff and legumes, instead of maize and sorghum. In parts of the highlands of Amhara, Tigray and Oromia regions, crops have been affected by torrential rains that resulted in waterlogging and triggered floods in some locations. In **the Sudan**, cereal production is expected at an above-average level as seasonal rains have been mostly favourable. Some standing crops have been affected by dry spells in September in parts of South Kordofan and North Darfur states and by localized flooding in Kassala, Sennar, White Nile, Blue Nile, Al Gezira and El Gadarif states due to torrential rains between June and August. An ongoing nationwide Government-led crop assessment will provide detailed production estimates. In **Kenya**, the 2016 "long-rains" season maize production is forecast at an average level as recent beneficial rains in most surplus producing areas had a positive effect on yields, partly offsetting the moisture deficits caused by the prolonged dry spell between the end May and early June.

Unfavourable prospects for cereal production are reported in **South Sudan** and parts of **Uganda**. In **South Sudan**, the overall cereal output is expected at a below-average level as insecurity often prevented farmers accessing their land to perform adequate cultivation practices, with frequent cases of completely abandoned fields. Significant decreases in the planted area were observed in Northern Bahr el Ghazal State, one of the biggest cereal-producing states, as a large number of people migrated to the Sudan seeking food and income opportunities following renewed fighting since July. However, favourable rains (with only localized floods in Greater Upper Nile Region) and increased plantings were recorded in some counties due to a relatively peaceful context in April/May. National 2016 crop production estimates will be provided by a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) currently deployed in the country. Similarly, crop production from the 2016 second season is estimated at below-average levels in southern and central areas of **Uganda** as severe dry weather conditions in October and November affected plantings and early crop development in most areas bordering Lake Victoria. In **Burundi** production of the 2017A season harvest is also expected at below-average levels following erratic rains and insecurity conditions, while production prospects are mostly favourable in **Rwanda**, except in some eastern areas.

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
East Africa	5.3	5.3	5.3	44.1	38.4	40.9	52.7	47.4	50.0	5.4
Ethiopia	4.2	4.2	4.3	19.2	18.8	19.0	23.6	23.1	23.4	1.1
Kenya	0.3	0.4	0.4	3.9	4.0	3.6	4.3	4.5	4.1	-9.8
Sudan	0.5	0.5	0.5	7.4	2.9	6.4	7.9	3.4	6.9	98.9
Uganda	0.0	0.0	0.0	3.3	3.2	3.2	3.6	3.4	3.4	-0.3
United Republic of Tanzania	0.2	0.1	0.1	7.9	7.2	6.7	10.7	10.3	9.8	-4.7

Note: Totals and percentage change computed from unrounded data.

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

Poor pasture conditions in several areas of Somalia, Kenya and Ethiopia

Conditions of grazing resources are significantly below average in most of southern and central **Somalia**, in southern and eastern **Kenya** and in southern and southeastern **Ethiopia**. In these areas, pasture and water availability failed to be adequately restored during the April-to-June rainy season due to poor precipitations and they were further depleted during the July-to-September dry season. Subsequently, the poor performance of the ongoing October-December short rainy season has caused a further deterioration of pasture conditions. Trekking distances have increased and so have animal concentrations, causing a quicker depletion of the remaining pastures. As a result, livestock body conditions are generally poor and milk production is well below average. Drought-related deaths of animals have also been reported in Kilifi, Kwale and Lamu counties in southern **Kenya**. Rangeland conditions are expected to remain stressed for the remainder of the season and a faster-than-normal depletion is expected during the next dry season between January and March 2017.

By contrast, pasture and water availability have significantly improved in Afar Region and in Sitti Zone in northern Somali Region of **Ethiopia**, following two consecutive seasons of favourable rains. However, although livestock body conditions and productivity are gradually improving, herd sizes are still well below average due to the low birth rates and the significant losses in 2015 as a consequence of the El Niño-induced drought.

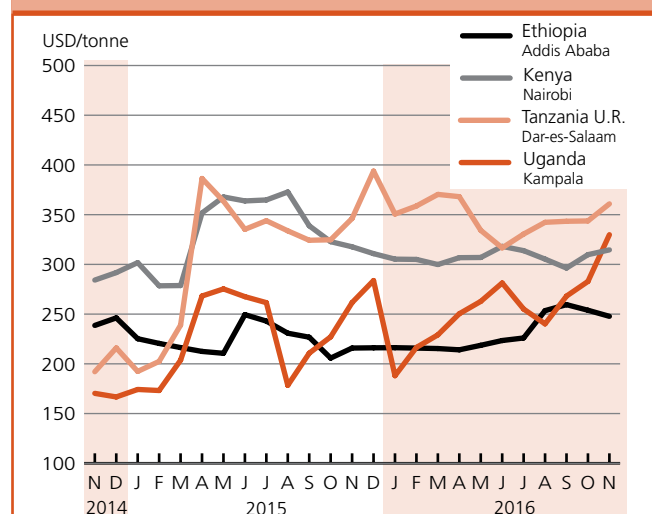
Cereal prices at high levels

Prices of cereals increased in recent months and in November were above their year-earlier levels in several countries. In **Uganda**, maize prices increased by 30-45 percent between August and November, as normal seasonal patterns were compounded by concerns over the performance of the second season harvest, to be gathered from December, and sustained export demand by neighbouring countries. As a result, November

maize prices were at record levels and up to 30 percent higher than 12 months earlier. In **Somalia**, prices of coarse grains remained firm in recent months in most key markets of central and southern areas, as the "gu" production was significantly reduced by erratic rainfall. Subsequently, prices surged by up to 50 percent in November in most monitored markets including the capital Mogadishu, as seasonal trends

were exacerbated by unfavourable prospects for the "deyr" secondary harvest. November prices were up to 60 percent higher than 12 months earlier. In **the United Republic of Tanzania**, prices of maize increased seasonally in October and November in all monitored markets and in Dar Es Salaam, the largest urban centre, prices were around their year-earlier levels. By contrast, in Arusha, located in a bi-modal rainfall area, maize prices in November were 26 percent higher than one year earlier, supported by a reduced "masika" season harvest in August and by unfavorable prospects for the "vuli" harvest, to be gathered early next year. In **South Sudan**, prices of maize and sorghum declined in the capital Juba by about 30 percent between the peak in July and October, as newly-harvested crops, food aid distributions and a partial resumption of imports from Uganda increased supplies. Subsequently, maize and sorghum prices

Figure 4. Maize prices in selected East African markets



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

increased in November by 20 and 12 percent, respectively, mainly due to a further sharp devaluation of the local currency. Overall, prices in November were three times higher than their year-earlier levels, reflecting the impact of insecurity that disrupted trade flows, tight supplies, currency weakness, fuel shortages and high transport costs. In **Kenya**, maize prices remained firm or slightly increased in October and November despite the ongoing “long-rains” main season harvest, partly due to unfavorable prospects for the “short-rains” harvest, to be gathered in early 2017. As a result, November prices were above their year-earlier levels in most markets. In **the Sudan**, prices of locally-produced sorghum declined by about 15 percent between September and November with the commercialization of the 2016 harvest. Similarly, prices of millet, mainly grown and consumed in western regions, decreased in the Al Fashir market, located in the North Darfur region, by 6 percent between August and November. Prices of sorghum and millet in November were around their year-earlier levels in several markets. In **Ethiopia**, maize prices declined by up to 20 percent between September and November as the “meher” main season harvest increased supplies. November prices were on average about 20 percent above their year-earlier levels, partly due to a reduced 2016 “belg” secondary harvest, completed in August.

Food insecurity expected to worsen in South Sudan and Somalia by early 2017

The lean season is over in most crop-producing areas and food security conditions are gradually improving as newly-harvested main season crops become available for consumption. However, improvements are likely to be short-lived in **South Sudan** as food stocks will only be partially replenished by the reduced harvest. Areas of major concern are central and southern counties of Unity State, Western and Northern Bahr el Ghazal states and some counties of Eastern, Western and Central Equatoria states that experienced high levels of insecurity in recent months with ensuing massive displacements of people. In these areas, food insecurity is likely to rapidly escalate to massive proportions with a concrete risk of famine for most vulnerable communities. Similarly, in **Somalia**, as the “deyr” crop production is forecast at well below-average levels, food security conditions are anticipated to quickly worsen during the first quarter of 2017 with households expected to exhaust their own stocks and rely mainly on markets to satisfy their food requirements.

In pastoral areas of southern and central **Somalia**, southern and southeastern **Ethiopia** and eastern and coastal **Kenya**, food security conditions are deteriorating due to the poor performance of the ongoing short rainy season. Most households are keeping much of their livestock in the dry season grazing areas, limiting access to livestock products as a source of food and income. Although livestock body conditions and milk production may improve slightly

during the remainder of the rainy season, food availability and access for most pastoral households is expected to be very low until the start of the 2017 “long-rains” season in March.

In **Ethiopia**, despite the new harvest increasing supplies, pockets of severe food insecurity conditions persist in eastern areas of Oromia, Amhara and Tigray regions as well as in southern Afar and northern Somali regions, due to the lingering effects of the 2015 severe drought on local livelihood systems. In **the Sudan**, high levels of food insecurity are reported among vulnerable households in Kassala, Red Sea and North Kordofan states as well as for IDPs and refugees residing in camps in the Greater Darfur Region and in South Kordofan State.

Currently, the number of people in need of humanitarian assistance in the subregion is estimated at 21.1 million (including 9.7 million in Ethiopia, 3.6 million in **the Sudan**, 3.4 million in **South Sudan**, 1.5 million in **Burundi**, 1.25 million in **Kenya**, 1.1 million in **Somalia**, 390 000 in **Uganda** and 194 000 in Djibouti). This number, despite the reduction of about 2.3 million people compared to the latest FAO estimate in September 2016, is about 25 percent more than the one year earlier, when it was estimated at 17 million people and almost twice the caseload two years earlier.

SOUTHERN AFRICA

Enhanced chance of above-average rainfall conditions during 2016/17 cropping season

Planting of the 2017 cereal crops commenced in southern areas in early November and sowing activities are expected to continue across the subregion into the start of next year. Most countries received good rains in November that prompted planting activities and benefitted early crop development; however, below-average precipitation was observed in northern parts of Zambia and northeast Angola, although these regions do not represent the countries’ main cereal producing areas. Weather forecasts indicate an enhanced chance of above-average rainfall conditions between December 2016 and March 2017, with the main harvest expected to begin from April. Although the favourable weather forecast boosts the 2017 production outlook, particularly regarding yield expectations, constrained availability of and access to cereal and legume seeds due to the impact of the drought-reduced harvests in 2015 and 2016, and given the significant proportion of households’ seed supply accounted for by own production and local informal markets, are expected to limit plantings, with potential negative impacts on production. In response, the governments and the humanitarian community, including FAO, are continuing to implement agricultural support programmes to ameliorate input access.

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
Southern Africa	2.0	1.7	2.1	28.9	22.2	18.5	4.6	4.3	4.3	35.6	28.2	24.9	-11.9
- excl. South Africa	0.3	0.3	0.3	13.4	11.1	10.1	4.6	4.3	4.3	18.2	15.6	14.7	-5.8
Madagascar	0.0	0.0	0.0	0.4	0.3	0.3	4.0	3.7	3.8	4.3	4.1	4.1	2.0
Malawi	0.0	0.0	0.0	4.1	2.9	2.4	0.1	0.1	0.1	4.2	3.0	2.5	-15.8
Mozambique	0.0	0.0	0.0	1.6	2.1	2.1	0.4	0.4	0.3	2.0	2.5	2.4	-3.6
South Africa	1.8	1.4	1.7	15.6	11.2	8.4	0.0	0.0	0.0	17.3	12.6	10.2	-19.4
Zambia	0.2	0.2	0.3	3.4	2.7	2.9	0.0	0.0	0.0	3.7	2.9	3.2	10.0
Zimbabwe	0.0	0.0	0.0	1.7	0.8	0.6	0.0	0.0	0.0	1.8	0.9	0.6	-26.9

Note: Totals and percentage change computed from unrounded data.

Planting estimates are not yet available for most countries, with government-led surveys expected to be conducted in December/January. In **South Africa**, early planting intentions for the 2017 commercial maize crop indicate a 27 percent year-on-year increase. The bulk of this expansion is on account of an expected larger area sown to white maize, the main food staple in the region, as farmers were encouraged by higher commodity prices and favourable weather forecasts. Given the expected area sown and with yields projected to return to near-average levels, aggregate production is preliminarily forecast between 12 and 13 million tonnes.

Drought-reduced 2016 harvest tightens supplies

The 2016 cereal output is estimated by FAO at 24.9 million tonnes, 21 percent (6.6 million tonnes) lower than the five-year average and 12 percent down on 2015's output. The bulk of the decrease results from a sharply lower maize harvest, estimated at 17.4 million tonnes, 17 percent (3.6 million tonnes) below 2015's output. Only Namibia and Zambia registered year-on-year production increases for maize, although the outputs still remained below average. The steep production decline was driven by the severe and extensive El Niño-induced drought that depressed cereal yields and increased crop losses, while the delayed start of seasonal rains curbed plantings, further contributing to the reduced output. At the country level, **South Africa** accounts for the bulk of the subregional cereal production decline in 2016, with large declines also estimated in **Malawi** and **Zimbabwe**. In **Madagascar**, despite an improved rice production in 2016, agricultural drought in southern regions resulted in production shortfalls for the third consecutive year in these areas.

As a result of the lower domestic outputs, the aggregate maize import requirement for the 2016/17 marketing year (generally May/April) is forecast to rise by nearly two-thirds compared to the level in 2015/16, with the bulk of the increase stemming from larger import forecasts in **South Africa** and **Zimbabwe**. **Malawi** is expected to be the third largest maize importer in the subregion,

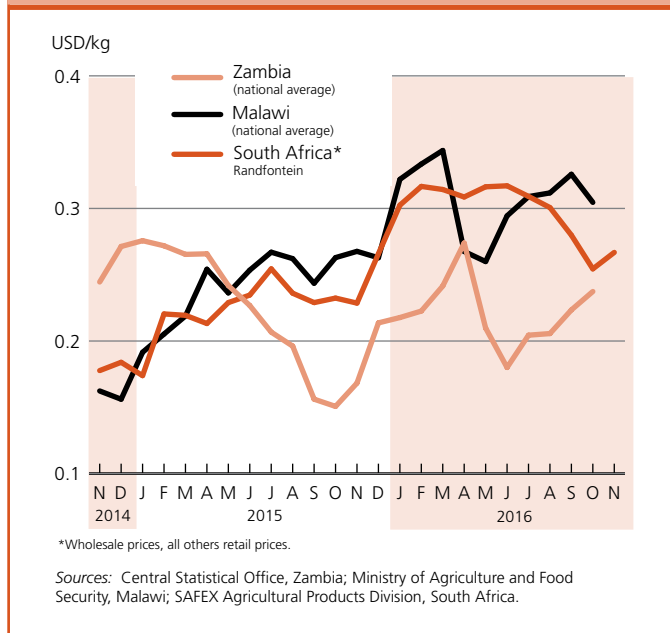
following two consecutive seasons of reduced harvests. Unlike previous years, **South Africa** is a net importer of maize, although it is still exporting to neighbouring countries, with most of the grain shipped to **Botswana**, **Lesotho**, **Namibia**, **Swaziland** and **Zimbabwe**. South Africa has so far imported about 1.5 million tonnes of maize, the bulk of which is yellow maize from Argentina and white maize from Mexico, satisfying approximately half of their forecasted import requirement.

While in the previous marketing year Zambia was firmly established as the second exporter of the subregion, the impact of the drought and consequent tighter domestic supply situation prompted the Government to impose an export ban on maize in October; this measure aims to ensure domestic supplies are sufficient to meet national needs. As a result, the countries in the subregion are expected to procure greater quantities of grain from external sources than previously expected. In Swaziland, import restrictions on individuals purchasing maize products from South Africa have been relaxed to help boost domestic availabilities.

Reduced supplies sustain higher cereal prices, despite some recent declines

Significant upward price pressure stemming from the sharply-reduced 2016 harvests have sustained higher year-on-year cereal prices across the subregion, however, in recent months prices have declined in some countries. In **South Africa**, prices of white maize have fallen since mid-2016, mostly pressured by lower international quotations, and in more recent months positive production prospects for the 2017 crop, as well as a slight strengthening of the local currency; the exchange rate has exerted more influence on prices this year as imports account for a greater share of domestic supplies. These lower prices curbed imported inflation in neighbouring countries, which is reflected in stable or slightly declining maize meal prices in **Namibia**, **Lesotho** and **Swaziland**. In **Malawi** and **Mozambique**, prices of maize grain remained well above their year-earlier levels, mainly due to tight domestic availabilities, while the depreciation

Figure 5. White maize prices in selected Southern African markets



of the national currencies have also added upward pressure. Similarly, in **Zambia**, prices of maize grain and maize meal were up by approximately one-quarter on a yearly basis in October mostly reflecting a tighter supply situation. In **Zimbabwe**, prices were largely declining in 2016 and remained well below their year-earlier levels. Large import volumes, the stronger US dollar, the main currency used in the country, relative to the South African rand, and liquidity constraints that negatively impact on consumers’ purchasing power, have contributed to the overall stable and lower prices in 2016.

Severely stressed food insecurity

Food security conditions are severely stressed across the subregion, with approximately 18.4 million people² expected to require assistance during the peak of the lean period (January-March 2017), up from 10.8 million in the previous year, according to the 2016 Vulnerability Assessment Committees’ (VACs) evaluations. The current situation is mainly reflective of the impact of the drought-reduced agricultural output and higher food prices. The food insecurity situation was further exacerbated by an economic downturn in some countries that has weakened households’ capacity to effectively respond to shocks. The poor food security conditions have caused increased malnutrition, with Madagascar, Malawi and Mozambique recording significantly high stunting rates.

In absolute terms, **Malawi** and **Zimbabwe** are forecast to have the highest numbers of food insecure, estimated at 6.5 million and 4.1 million people, respectively. **Mozambique** registered a sharp deterioration in food security conditions, mainly in the drought-affected southern provinces, while significant rises in food insecure numbers were estimated in the import-dependent countries of **Botswana, Lesotho, Namibia** and **Swaziland**. Consecutive seasons of reduced agricultural outputs in southern regions of **Madagascar** have resulted in severe food insecurity in these areas, with up to 850 000 people requiring emergency assistance.

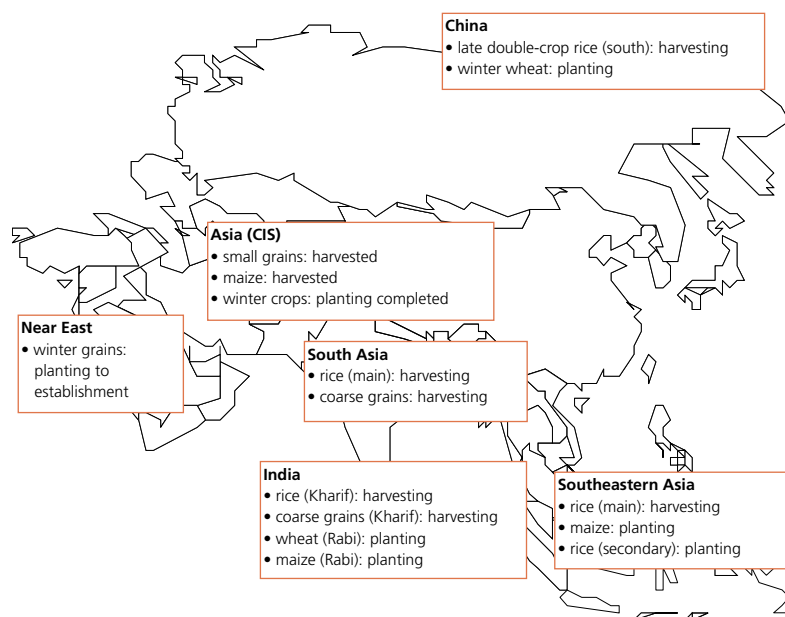
A region-wide appeal was launched by the SADC, requiring USD 2.7 billion to support the humanitarian needs of the drought-affected population. FAO is implementing a region-wide response programme in close cooperation with national governments to help build more resilient agricultural livelihoods and provide immediate support to farmers for the next cropping season, whose productive capacity has been eroded due to consecutive reduced harvests.

² This figure excludes South Africa

FAR EAST

Aggregate cereal production in 2016 to hit a record high, reflecting strong rebound for wheat and rice

In northern hemisphere countries, harvesting of the 2016 main season rice and maize crops is well advanced and planting of the 2016/17 winter wheat and secondary rice crops is underway. Far Eastern countries along or south of the Equator, namely **Indonesia, Malaysia, Sri Lanka, Timor-Leste** as well as **Viet Nam** have almost concluded the 2016 off-season paddy and maize harvests and are currently engaged in the 2017 main season planting. After the below-average rains at the start of the year linked to the 2015/16 El Niño episode, abundant monsoon rains and improved water availabilities for irrigation have boosted 2016 crop output prospects in most countries of the subregion. As a result, FAO's forecast for the subregional aggregate cereal production in 2016 has been revised upward to 1 250 million tonnes, which represent a strong rebound from the weather-affected 2015 harvest and a record high. The revision primarily mirrors improved crop prospects in **India**, with aggregate cereal production in 2016 pointing to a 16.5-million-tonne recovery from the previous year's level (6 percent) to 297.6 million tonnes (paddy terms), reflecting a return to normal levels of both plantings and yields. Similarly, favourable weather conditions boosted cereal production prospects in **Bangladesh, Bhutan, Cambodia,**



Note: Comments refer to situation as of December.

Democratic People's Republic of Korea, Nepal and Thailand, and outputs are expected to recover from last year's reduced levels in **Mongolia, Myanmar, the Lao People's Democratic Republic, the Philippines and Pakistan.** By contrast, dry weather conditions during the 2016 main season, which was harvested by the second quarter of the year, resulted in an overall lower harvests in **Indonesia, Viet Nam and Timor-Leste.**

Production of paddy rice, the major staple in the subregion, is forecast at 673.4 million tonnes, about 9.4 million tonnes above the reduced level of the previous year. Much of the subregion's projected growth is expected to be sustained by an output recovery in **India,**

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
Far East	252.9	246.4	252.6	323.0	326.9	324.2	668.4	664.0	673.4	1 244.4	1 237.3	1 250.1	1.0
Bangladesh	1.3	1.4	1.4	2.6	2.7	2.7	51.8	52.5	52.5	55.7	56.5	56.5	0.1
Cambodia	0.0	0.0	0.0	0.5	0.4	0.8	9.3	9.3	9.5	9.9	9.7	10.3	5.3
China	126.2	130.2	128.6	225.2	234.5	225.3	208.2	209.8	210.8	559.7	574.6	564.7	-1.7
India	95.9	86.5	93.5	43.1	38.1	42.7	158.2	156.5	161.5	297.1	281.1	297.6	5.9
Indonesia	0.0	0.0	0.0	19.0	19.6	19.7	70.8	73.0	71.9	89.9	92.6	91.6	-1.1
Japan	0.9	1.0	1.0	0.2	0.2	0.2	10.8	10.5	10.7	11.8	11.7	11.9	1.2
Myanmar	0.2	0.2	0.2	1.6	1.8	1.8	28.2	27.5	28.0	30.1	29.4	30.0	1.9
Nepal	2.0	1.7	1.9	2.5	2.6	2.6	4.8	4.3	5.0	9.3	8.6	9.5	10.4
Pakistan	26.0	25.1	25.5	5.5	5.6	5.8	10.5	10.2	10.3	42.0	40.9	41.6	1.7
Philippines	0.0	0.0	0.0	7.7	7.0	7.8	18.9	17.5	18.7	26.6	24.4	26.5	8.4
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.8	5.6	5.9	6.0	5.8	-2.5
Thailand	0.0	0.0	0.0	4.9	4.8	5.2	33.5	28.5	31.1	38.4	33.3	36.3	9.0
Viet Nam	0.0	0.0	0.0	5.2	5.3	5.0	45.0	45.2	44.2	50.2	50.5	49.2	-2.6

Note: Totals and percentage change computed from unrounded data.

where paddy production is forecast at a record of 161.5 million tonnes. This level would stand 3 percent above last year's weather-reduced outcome, reflecting a more normal pattern of the monsoon this year and sustained Government support to the sector, namely large public sector purchases at higher Minimum Support Prices (MSP). After seeing the output depressed by precipitation shortages last year, abundant monsoon rains and improved water availabilities for irrigation are expected to lead to large recoveries in **the Philippines** and **Thailand**. In **China** (Mainland), the semi-official forecasts of production indicate that

the 2016 harvest is set to exceed the 2015 record, amounting to 209.1 million tonnes. The slight increase would come on the back of expansions in the area under paddy, promoted by the maintenance of the minimum purchase prices for rice, despite some flood losses in southern producing provinces. Production expectations also remain positive in **Bhutan, Cambodia, Japan** and **Nepal**, as well as **the Democratic People's Republic of Korea, Myanmar** and **Pakistan**, where 2016 paddy outputs are anticipated to partially recover from last year's reduced levels. The outlook is more subdued for countries along or south of the Equator, namely **Indonesia, Viet Nam, Malaysia** and **Timor-Leste**, as the dry conditions linked to the 2015/16 El Niño negatively affected the 2016 main season crops, which were planted in the last quarter of 2015 and early 2016 and harvested in the first part of 2016. In **Sri Lanka**, a dry spell followed by floods during planting time reduced the 2016 secondary crop, resulting in a overall 7 percent year-on-year decrease in overall output in 2016.

The subregion's 2016 aggregate maize production is estimated at 294.4 million tonnes, marginally below last year's record level, mainly reflecting a 9.6-million-tonne (or 4 percent) production decline in **China**. The Government's decision to end the maize procurement at high minimum support prices this year in attempt to lower domestic stock levels, prompted farmers to shift away from maize cultivation to more profitable crops, including soybeans. By contrast, improved weather conditions are expected to sustain a recovery in 2016 maize output in **India, Cambodia** and **the Philippines**.

The subregional 2016 wheat crop, harvested in the first half of the year, is estimated at a near-record level of 252.6 million tonnes. A major improvement, in absolute terms, in the subregion's growth comes from **India**, where the 2016 wheat output is officially estimated at 93.5 million tonnes, an 8 percent recovery from last year's reduced output. A year-on-year contraction in plantings, due to poor irrigation water supplies at sowing time, was more

Table 12. Far East cereal production and anticipated trade in 2016/17¹
(thousand tonnes)

	Avg 5-yrs (2011/12 to 2015/16)	2015/16	2016/17	2016/17 over 2015/16 (%)	2016/17 over 5-yr avg (%)
Cereals - Exports	45 103	41 639	39 422	-5.3	-12.6
Cereals - Imports	110 350	129 700	123 963	-4.4	12.3
Cereals - Production	1 000 369	1 014 241	1 023 936	1.0	2.4
Rice-milled - Exports	34 668	34 514	34 879	1.1	0.6
Rice-milled - Imports	13 571	13 556	13 307	-1.8	-2.0
Rice-milled - Production	440 992	440 929	447 165	1.4	1.4
Wheat - Exports	5 436	2 697	2 735	1.4	-49.7
Wheat - Imports	39 724	45 254	48 823	7.9	22.9
Wheat - Production	244 188	246 420	252 571	2.5	3.4

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

than offset by record yields, as a result of favourable weather conditions and improved irrigation water availability during the key stages of crop development. Similarly, favourable weather conditions, coupled with good supplies of basic inputs, resulted in a bumper wheat output in 2016 for **Pakistan**. By contrast, the wheat output in **China (Mainland)** is estimated to have declined slightly in 2016, to 128.6 million tonnes despite an expansion in plantings on account of a combination of unfavourable weather in the form of dry spells and excessive rains which reduced yields.

Planting prospects for 2017 wheat crop generally favourable

Planting of the 2017, mostly irrigated, winter wheat is currently underway and will continue until mid-December. In **India**, the early official forecast for the 2017 wheat crop is set at 93.9 million tonnes, marginally above the bumper level of 2016, as improved water availability for irrigation is expected to boost plantings and yields. In **Pakistan**, the 2017 wheat output is officially projected to reach a record level of 26 million tonnes, 2 percent up from the bumper output in 2016, on expectations that adequate water availability will boost plantings, while a good supply of quality seeds, fertilizers and herbicides will increase yields. Similarly, the outlook for wheat is also positive in **China (Mainland)**, where conditions have been generally favourable in the main growing areas, facilitating field work and benefitting the establishment of earlyplanted crops.

Subregional cereal trade forecast to decrease in 2016/17 marketing year

Given the expected increase in the subregional 2016 cereal output, FAO forecasts the aggregate cereal imports in the 2016/17 marketing year at 124 million tonnes, 4 percent below the 2015/16 record but 12 percent above the five-year average. The bulk of the year-on-year decrease reflects the lower demand for feed cereals by China (Mainland), mainly resulting

from the Government's efforts to lower the large national maize inventories. As a result, imports of barley and sorghum in the 2016/17 marketing year are forecast to fall by 43 percent to 4.6 million tonnes and 40 percent to 5 million tonnes, respectively. Similarly, maize imports by China (Mainland) are forecast to decrease by almost 40 percent to 2 million tonnes. Aggregate wheat imports in 2016/17 are set to increase to a record level of 48.8 million tonnes, up 8 percent from last year's high level, mainly reflecting increased demand from Indonesia for low quality wheat for animal feed. In the case of rice, imports in the 2017 calendar year are projected to decrease by 2 percent from the reduced level in 2016, reflecting cuts by traditional buyers, such as the Philippines and Indonesia, where purchases may be discouraged by increased local availabilities and public steps to advance self-sufficiency policies. Aggregate cereal exports in 2016/17, consisting primarily of rice, are forecast to decrease for the second consecutive year to 39.4 million tonnes, marking the lowest level since 2011/12. Rice deliveries are expected to recover only slightly in the 2017 calendar year, mostly on account of expected subdued global demand.

Rice prices followed mixed trends, while wheat prices were stable

Domestic prices of rice, in local currencies, have followed mixed trends across the subregion in recent months. In **Thailand**, domestic rice prices declined for the fourth consecutive month in November and were below their year-earlier levels as a result of a slow pace of exports and harvest pressure. In an attempt to prevent prices from decreasing further, the Government of Thailand implemented

a number of measures, including the temporary suspension of Government stock releases and a mortgaging programme geared at delaying farmer sales of main crop supplies. In **Myanmar**, rice prices also declined further amid new crop arrivals and low demand from China, the country's main buyer, and were almost 20 percent down in November compared to a year earlier. In **India**, prices eased with improved supplies from the bumper 2016 main season harvest and a weak demand for export, although ongoing Government procurement purchases limited the declines. In **China**, **the Philippines** and **Indonesia**, rice prices were generally stable and close to their year-earlier levels reflecting adequate domestic availabilities. By contrast, prices increased since September in **Sri Lanka**, with seasonal tightness exacerbated by a reduction in the 2016 secondary "yala" crop. As for wheat and wheat flour, prices remained stable or increased slightly and were around or below their year-earlier levels. In **China**, **Indonesia** and **Sri Lanka**, prices were stable amid adequate domestic availabilities. Similarly, in **Bangladesh** prices were unchanged and remain well below their year-earlier levels following large imports and continued Open Market Sales (OMS) by the Government. By contrast, prices were firmer in **India**, due to lower stocks compared to last year and strong domestic demand. In an attempt to prevent sharp price increases, the Government of India announced, in mid-October, its plans to distribute 1 million tonnes of wheat through the OMS in addition to the 2.8 million tonnes which were released since the beginning of the 2016/17 marketing year in April. In **Pakistan**, prices of wheat strengthened following seasonal patterns, but remained below their year-earlier levels due to good availabilities following a bumper 2016 crop.

Figure 6. Rice retail prices in selected Far East countries

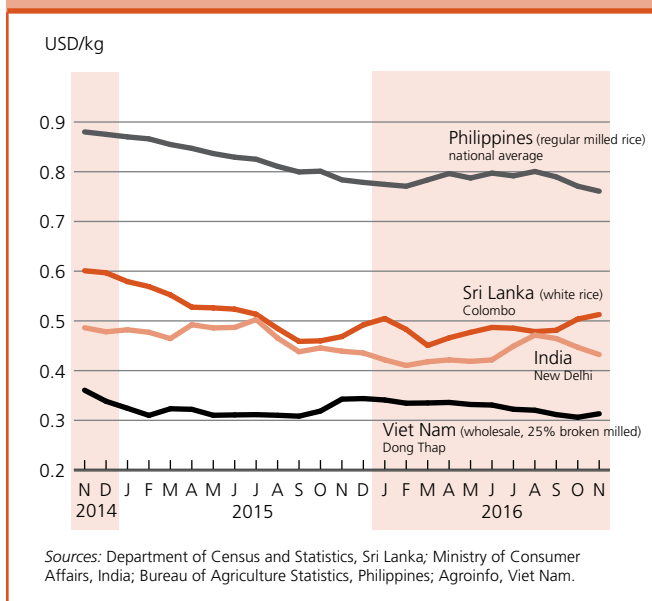
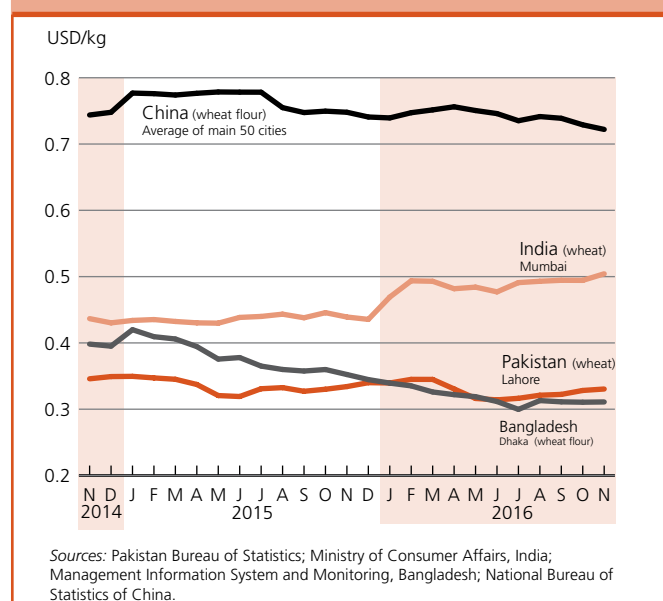


Figure 7. Wheat and wheat flour retail prices in selected Far East countries



NEAR EAST

Planting of 2017 winter season crops underway

Land preparation and planting of the 2017 winter cereal crops are proceeding under mixed conditions. As of late November, the major winter wheat producing areas in central and southeastern parts of **Turkey** suffered from drought, with rainfall deficits between early September and the end of November ranging from 50 to 65 percent. Similarly, early season drought was reported in central and southern **Iraq** and western **Iran (Islamic Republic of)**. Elsewhere in the region, conditions remained favourable for planting and establishment.

Above-average aggregate cereal crop harvested in 2016

The aggregate subregional 2016 cereal output (including paddy rice) is put at 69.2 million tonnes, an decrease of about 4 percent from last year's exceptional crop but 3 percent above the five-year average. In **Turkey**, the main producer in the subregion, official estimates indicate a 10 percent decrease in cereal production in 2016 compared to last year, of about 34.9 million tonnes, including 20.5 million tonnes of wheat (10 percent below the output in 2015) and 13.4 million tonnes of coarse grains (11 percent down from the 2015 harvest). In **Iran (Islamic Republic of)**, the second biggest wheat producer in the subregion, the 2016 production of 13.5 million tonnes exceeds the 2015 harvest by 2 million tonnes and the five-year average by 38 percent. In **Afghanistan**, despite higher-than-usual winter temperatures that diminished water moisture, an about-average 4.6 million tonnes of wheat were harvested. In **Iraq**, the wheat harvest is estimated at an average level of 3 million tonnes.

In the **Syrian Arab Republic**, the country's agricultural productive capacity has been severely eroded by several years of conflict, which contributed to the lack of inputs and damage to agricultural machinery, irrigation systems and storage facilities. While the main growing area of Hassakeh in the east of the

country received above-average rainfall, weather conditions were less favourable in other cereal-producing areas in Aleppo, Idlib and Homs. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in June 2016. The Mission estimated the 2016 wheat harvest at about 1.5 million tonnes, some 37.5 percent lower than the relatively favourable harvest of 2015 and approximately 55 percent lower than the pre-conflict average (2007-2011). Being predominantly rainfed and more resilient than wheat, barley production was estimated at 877 000 tonnes, almost 10 percent lower than the record crop of the last year, but about one-quarter higher than the pre-conflict average (2007-2011).

In **Yemen**, in many key producing areas such as Taiz and Sana'a, rainfall in 2016 has been better than last year, boosting soil moisture levels. However, as a result of the persistent conflict, almost all governorates report shortage of agricultural supplies as well as high prices of inputs with negative implications for the current agriculture season. Most agricultural activities, particularly related to irrigated agriculture, suffer from high fuel prices. Many rural households rely on casual labour as a source of income. In the current conflict situation and to cope with increased costs of production, hired agricultural labour is usually replaced by family labour.

Overall, the above-average aggregate cereal production resulted in a lowering of the cereal import requirement forecast to about 62.7 million tonnes, nearly the same as last year and 2.5 percent below the five-year average.

No improvement in conflict-stricken Iraq, the Syrian Arab Republic, Yemen and Afghanistan

In the **Syrian Arab Republic**, as of June 2016, about 9.4 million Syrians were estimated to be in need of food assistance, up 8 percent from September 2015. The rate of the increase is most notable in Quneitra, Dara'a, Damascus, Idlib and Aleppo governorates, which have experienced new displacement and worsening food access conditions. In **Iraq**, over 4 million people have been displaced from their homes, of whom nearly 2 million

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
Near East	41.3	45.0	43.6	20.3	22.7	20.9	4.4	4.3	4.7	66.0	72.0	69.2	-3.9
Afghanistan	5.4	4.7	4.6	0.7	0.7	0.7	0.8	0.6	0.6	6.9	6.0	5.9	-2.1
Iran (Islamic Republic of)	10.6	11.5	13.5	3.7	3.9	3.9	2.3	2.7	2.9	16.7	18.1	20.3	12.1
Iraq	3.5	3.2	3.0	1.2	1.1	1.0	0.4	0.1	0.3	5.1	4.4	4.3	-1.8
Syrian Arab Republic	1.9	2.4	1.5	0.8	1.1	1.0	0.0	0.0	0.0	2.6	3.6	2.6	-27.9
Turkey	19.0	22.6	20.5	12.9	15.1	13.4	0.8	0.9	0.9	32.8	38.6	34.9	-9.7

Note: Totals and percentage change computed from unrounded data.

since January 2014, many of them repeatedly. An estimated 2.4 million people are currently food insecure, including 1.5 million facing severe food insecurity conditions. A reduced public budget resulted in disruptions to the Government's Public Distribution System (PDS), the main source of food for the poorest Iraqis, and consequently increased the vulnerability of the affected population, particularly those who are internally displaced. In **Yemen**, the Integrated Food Security Phase Classification (IPC) from June 2016 estimates that about 51 percent of the population (14.12 million) is under IPC "Emergency" and "Crisis" phases due to widespread conflict and insecurity, dwindling livelihood opportunities, a sharp downturn in the economy, and disrupted market network and access. The actual figures, however, are likely to be higher. In **Afghanistan**, according to the IPC analysis of April 2016, 8.4 million people are classified in the acute food insecurity crisis and emergency situation. The most food insecure population are in Ghor, Badakhshan, Nuristan and Nangarhar provinces. Changes in refugee policies in Pakistan have led to steep increases in returnees: up to 400 000 undocumented returnees and around 200 000 documented returnees will arrive in Afghanistan by the end of 2016 putting strain on limited local resources, particularly in the eastern province of Nangarhar.

CIS IN ASIA³

Planting of 2017 winter crops nearly complete under generally favourable weather conditions

Planting of the 2017 winter cereal crops to be harvested next year is almost complete under generally favourable conditions. Although in Kazakhstan cold weather at the end of October negatively impacted planting activities, overall conditions of winter cereals in the subregion are reported to be satisfactory. The total area planted in the subregion is estimated to be unchanged compared to last year.

Record cereal output estimated in 2016

Harvesting of the 2016 cereal crop is almost complete. The subregional aggregate output is estimated at record level of

36.7 million tonnes, nearly 8.4 percent up from the already high level of last year. Wheat, which represents more than 60 percent of total cereal output, is forecast at 28.7 million tonnes in 2016, 2.5 million tonnes above the level in 2015.

Most of the projected cereal increase (in absolute terms) comes from **Kazakhstan**, the main producer of the subregion, where cereal production increased from 15 percent to 20.6 million tonnes. The bulk of the projected increase is on the back of a larger wheat output, estimated at almost 16 million tonnes, the highest level since 2011. The larger wheat output aided the replenishment of stocks, which at the beginning of the 2016/17 marketing year (July/June) were estimated at their lowest level since 2009. However, the quality of wheat is reported to be lower than last year, following unfavourable weather during the growing period.

In **Georgia**, the 2016 cereal production is projected at a record level mainly resulting from an expansion in the area planted for wheat that is expected to boost production. In **Tajikistan**, the wheat output is also forecast to increase, following the favourable weather during the spring and summer seasons. In **Turkmenistan**, the wheat output is estimated at 1.6 million tonnes, 14 percent up from last year. Improved yields following favourable weather have resulted in small year-on-year increases in **Uzbekistan's** cereal production. By contrast, following a contraction in wheat plantings, total cereal production in **Kyrgyzstan** is estimated to decline by 17 percent. Similarly, small production declines are estimated in **Armenia** and **Azerbaijan**.

Cereal import requirements forecast to decline in 2016/17 marketing year

Exports from **Kazakhstan**, the main supplier of milling wheat in the subregion, are forecast to decrease by 5 percent to

Table 14. CIS in Asia cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			Change: 2016/2015 (%)
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	
CIS in Asia	25.1	26.2	28.7	6.3	7.1	7.5	32.2	34.2	37.0	8.4
Armenia	0.3	0.4	0.4	0.2	0.2	0.2	0.6	0.6	0.6	-7.8
Azerbaijan	1.4	2.0	1.9	0.9	1.3	1.2	2.4	3.3	3.1	-4.6
Georgia	0.1	0.1	0.3	0.4	0.3	0.4	0.4	0.4	0.7	61.4
Kazakhstan	13.0	13.7	15.9	3.4	3.8	4.3	16.8	17.9	20.6	14.6
Kyrgyzstan	0.6	0.7	0.6	0.8	1.0	0.8	1.4	1.8	1.5	-16.5
Tajikistan	0.9	0.9	1.0	0.2	0.2	0.3	1.2	1.1	1.4	18.6
Turkmenistan	1.2	1.4	1.6	0.1	0.1	0.1	1.4	1.6	1.8	11.9
Uzbekistan	7.6	7.0	7.0	0.3	0.2	0.3	8.1	7.4	7.5	0.9

Note: Totals and percentage change computed from unrounded data.

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.

8 million tonnes in the 2016/17 marketing year (July/June), following a reduction in grain quality. Traditional importers of high quality wheat, such as the Islamic Republic of Iran, Azerbaijan and China, are expected to import less Kazakh wheat in the current marketing year. However, this decline in shipments is expected to be partially offset by increased exports to Afghanistan and other Central Asian countries. By contrast, exports of barley are expected to increase as a result of the good crop in 2016.

The aggregate subregional wheat import requirement is expected to decrease by 1.6 percent, following better harvests in **Uzbekistan, Turkmenistan and Tajikistan**.

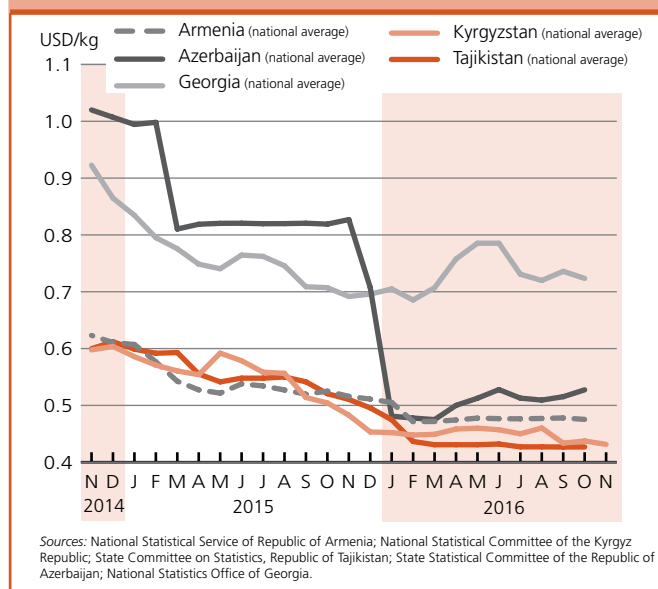
Wheat flour prices remained generally stable

Prices of wheat flour in importing countries of the subregion remained generally stable over last three months and were slightly below their year-earlier levels. Despite a record harvest in Kazakhstan, the subregion's the main exporter, the shortage of high quality wheat limited the decline of export prices.

In **Armenia** and **Georgia**, retail prices of wheat flour remained virtually unchanged over the last three months and were generally down from a year earlier reflecting adequate supplies from the 2016 harvests and imports. Similarly, in **Tajikistan**, prices of wheat flour remained unchanged in November despite the 2016 bumper crop, but were 5 percent below their record high values of January 2016. Despite an estimated reduction in the 2016 wheat output, prices of wheat

flour in **Kyrgyzstan** declined by around 5 percent between August and November. By contrast, in **Azerbaijan**, the strong devaluation of the national currency remains the main factor for food price increases. In November, the price of locally-produced wheat flour was more than 50 percent higher than in the corresponding period of last year.

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



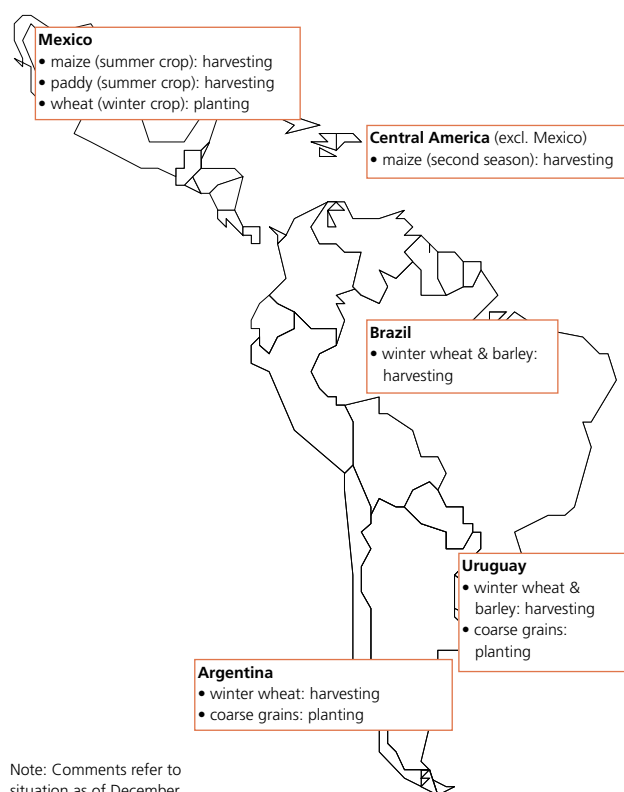
CENTRAL AMERICA AND THE CARIBBEAN

Recovery in yields boost wheat production in 2016

In **Mexico**, virtually the only wheat producer in the subregion, the 2016 wheat production is estimated at 3.8 million tonnes, 2.7 percent up from the previous year and above the five-year average. The increase largely reflects a partial recovery in yields from last year's drought-reduced levels as sowings were relatively unchanged from the previous year.

Maize production in 2016 estimated at bumper level

FAO's latest forecast for the subregion's aggregate 2016 maize production remains relatively unchanged at 30.2 million tonnes, higher than last year and the previous five-year average. The bumper 2016 maize crop mainly reflects good prospects in Mexico, the subregion's main producer accounting for 85 percent of the aggregate maize output. In Mexico, the harvest of the spring/summer maize crop is well advanced and prospects for the season are favourable. The aggregate 2016 maize output is anticipated to reach a record 25.6 million, reflecting the bumper autumn/winter crop, harvested in August, and the good results of the spring/summer crop. Elsewhere in the subregion, the prospects for the 2016 maize crops (first and second season) are good as the main "de primera" season, harvested in October and which represents between 40 and 60 percent of the total maize output in El Salvador, Guatemala, Honduras and Nicaragua, significantly recovered from last year's drought-reduced levels. Planting of the second season's cereal crop, to be harvested from late December, also concluded in early October under favourable weather conditions. Production prospects are favourable as the



weather during the season has favoured crop development and farmers received Government assistance in the form of inputs, such as seeds and fertilizers. The current forecast puts the 2016 maize crop in the subregion, excluding Mexico, at 4.5 million tonnes, up 18.4 percent from last year's drought-reduced output and above the five-year average.

In **Haiti**, cereal production was revised downward by 188 000 tonnes to 421 000 tonnes (milled rice equivalent) following the impact of Hurricane Matthew, which made landfall in the southwest of the country at the beginning of October and caused significant damage to the recently-planted cereal crops as

Table 15. Latin America and Caribbean cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
Central America & Caribbean	3.7	3.7	3.8	36.4	34.9	37.4	2.9	2.6	2.8	43.0	41.3	43.9	6.5
El Salvador	0.0	0.0	0.0	0.9	0.8	1.0	0.0	0.0	0.0	1.0	0.8	1.0	25.4
Guatemala	0.0	0.0	0.0	1.9	1.9	1.9	0.0	0.0	0.0	1.9	1.9	2.0	2.2
Honduras	0.0	0.0	0.0	0.5	0.4	0.6	0.1	0.0	0.1	0.5	0.4	0.6	39.4
Mexico	3.7	3.7	3.8	31.8	30.8	32.4	0.3	0.2	0.2	35.8	34.7	36.5	5.0
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.5	0.3	0.3	0.3	0.8	0.7	0.9	22.0
South America	24.4	20.8	25.3	137.9	148.2	128.5	24.7	25.7	23.4	187.0	194.7	177.2	-9.0
Argentina	13.9	11.3	15.0	40.0	42.4	47.4	1.6	1.6	1.4	55.5	55.3	63.8	15.4
Brazil	6.3	5.5	6.3	82.9	88.2	65.9	12.1	12.4	10.6	101.3	106.1	82.8	-22.0

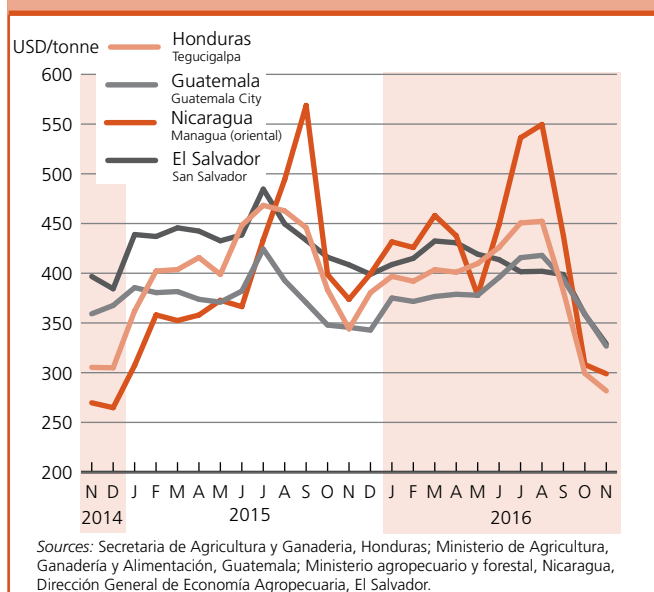
Note: Totals and percentage change computed from unrounded data.

well as to cereal stocks that had been recently harvested. However, this forecast assumes that yields have improved in some areas that received above-normal but beneficial rainfall, without incurring in crop losses and that farmers in non-affected departments will have access to inputs for the second and third agricultural seasons, to be harvested from December and February, respectively. At this level, the 2016 cereal production is still anticipated to recover from last year's drought-reduced level, but remains below the five-year average for a third consecutive year.

White maize prices decreased sharply in September-November period

Maize prices decreased sharply in the September-November period, mainly reflecting new supplies from the good main season harvest, which concluded in October, and, with the exception of Mexico, prices were significantly below their levels from a year earlier. The strongest declines were observed in **Honduras** and **Nicaragua** where white maize prices declined by about 40 percent between September and November, reflecting the strong recovery in 2016 output from last year's drought-reduced level. In **Haiti**, prices for locally-produced maize meal declined or were stable in previous months reflecting new harvest supplies. However, in Les Cayes market, in the southwest of the country that was strongly affected by Hurricane Matthew, prices increased by nearly 80 percent between September and November and were more than 20 percent above their levels from November 2015, reflecting tight supplies. White maize prices in **Mexico** remained firm but at high levels that were sustained by the weak local currency, despite the increase in this year's production.

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



SOUTH AMERICA

Cereal production in 2016 estimated at high level, despite recent downward revisions reflecting significant output declines in key countries

FAO's forecast for 2016 cereal production has been further revised downward to 169.6 million tonnes, almost 9 percent below last year's record level. However, at this level the cereal output is still anticipated to remain above the subregion's five-year average. The latest downward revision mainly reflects a much lower than previously anticipated 2016 maize crop in **Brazil**, now estimated at 63.5 million tonnes, its lowest level in more than five years. The impact of El Niño-related dry weather on the second season "de safrinha" maize crop was far worse than earlier expected, causing yields and the area harvested to decline significantly compared to the corresponding season in 2015. By contrast, the 2016 maize crop in **Argentina**, gathered earlier in the year, is estimated at a record level of 39.8 million tonnes. The removal of export controls and the weak national currency that boosted demand for Argentine maize for export, encouraged farmers to expand plantings. Moreover, good weather during the season favoured crop development leading to high yields. Elsewhere in the subregion, maize production is anticipated to decline. In **Bolivia (Plurinational State of)**, lower plantings, drought conditions at the end of the main summer season and pest infestations significantly reduced the 2016 maize output. On 21 November, the Government declared a national state of emergency as 162 000 families were affected by the drought and 607 000 hectares of crop land were impacted, including some 600 000 heads of cattle. In **Chile** and **Paraguay**, sharp reductions in plantings, reflecting low commodity prices and higher production costs, are anticipated to reduce this year's crops by at least 25 percent. In **Colombia**, the 2016 maize output is anticipated to remain relatively unchanged. In **Venezuela (Bolivarian Republic of)**, maize production in 2016 is forecast to remain at a below-average level but above last year's drought-reduced level, reflecting lower water availabilities due to El Niño and farmers' difficulty in accessing inputs despite considerable Government efforts to facilitate access to seeds and fertilizers.

The 2016 wheat crop in the subregion, harvest of which will conclude in late December, is preliminarily estimated at 25.2 million tonnes, a record level. The increase mainly reflects higher sowings in **Argentina** and **Brazil**, which account for the bulk of the subregion's wheat production, in response to high prices and high domestic demand, particularly in the latter country. In **Chile**, where the 2016 wheat crop was already harvested in February, the latest official estimate puts production

at 1.7 million tonnes, 17 percent above last year's level. By contrast, in **Paraguay**, the wheat output in 2016 is anticipated to decline by almost 25 percent to 800 000 tonnes, its lowest level since 2013, as low commodity prices and high production costs discouraged farmers to plant.

Planting of the 2017 maize crop is underway in several countries of the subregion. In **Argentina**, maize plantings are forecasts to increase 5.5 percent over last year's high level reflecting the prevailing local high prices and robust export demand. In **Brazil**, planting of the first season 2017 maize crop is well advanced. Early official estimates point to a significant increase in the area planted over last year's reduced level supported by high local prices and favourable weather conditions. In **Chile**, planting of the 2017 maize crop is virtually concluded, official estimates are not yet available, but the good weather conditions and prevailing high prices are anticipated to support increased sowings. In **Paraguay**, planting of the 2017 maize crop concluded in September, and preliminary estimates point to a 3 percent contraction in the area sown, mainly the result of low export prices. In **Bolivia**, planting of the 2017 summer crop is nearly complete. Data on plantings are not yet available, but prospects are uncertain as precipitations were mostly below average during the September to October period, when the bulk of the planting takes place.

Cereal exports in 2016/17 forecast below previous year's record volume but still at high level

The latest forecast for the subregion's aggregate cereal exports in the 2016/17 marketing year, the bulk of which is maize, has been revised downward to 45.1 million tonnes, 21 percent

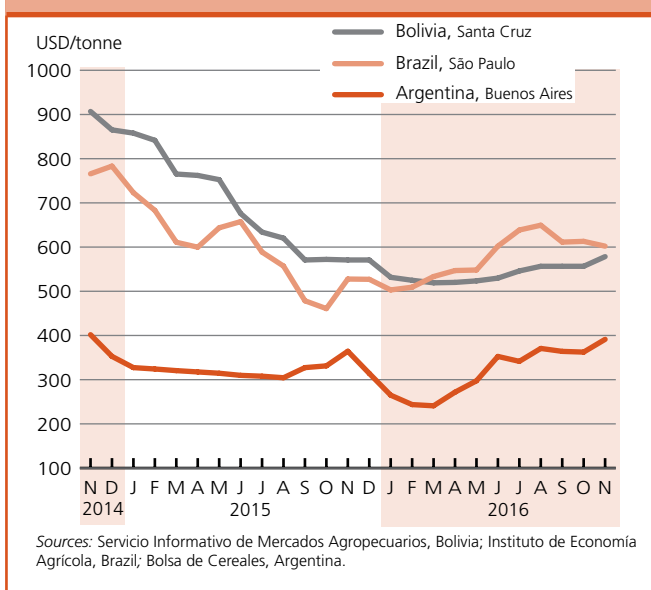
below last year's record, but slightly above the five-year average. The downward revision reflects lower-than-anticipated maize availabilities in Brazil, due to the reduced 2016 maize crop. In **Brazil**, maize exports are forecast to decline some 48 percent from last year's high level in the 2016/17 marketing year (March/February) and reach its lowest level in more than five years. By contrast, in **Argentina**, maize exports in the 2016/17 marketing year (March/February) are forecast at a record level of 24 million tonnes. The higher forecast is largely underpinned by the removal of export restrictions and ample availabilities from this year's record maize crop. The subregional wheat export forecast has been revised from the previous estimate and is now expected to remain at virtually the same high level as the previous year, reflecting the bumper 2016 crop in Argentina, which accounts for about 80 percent of the subregion's exports.

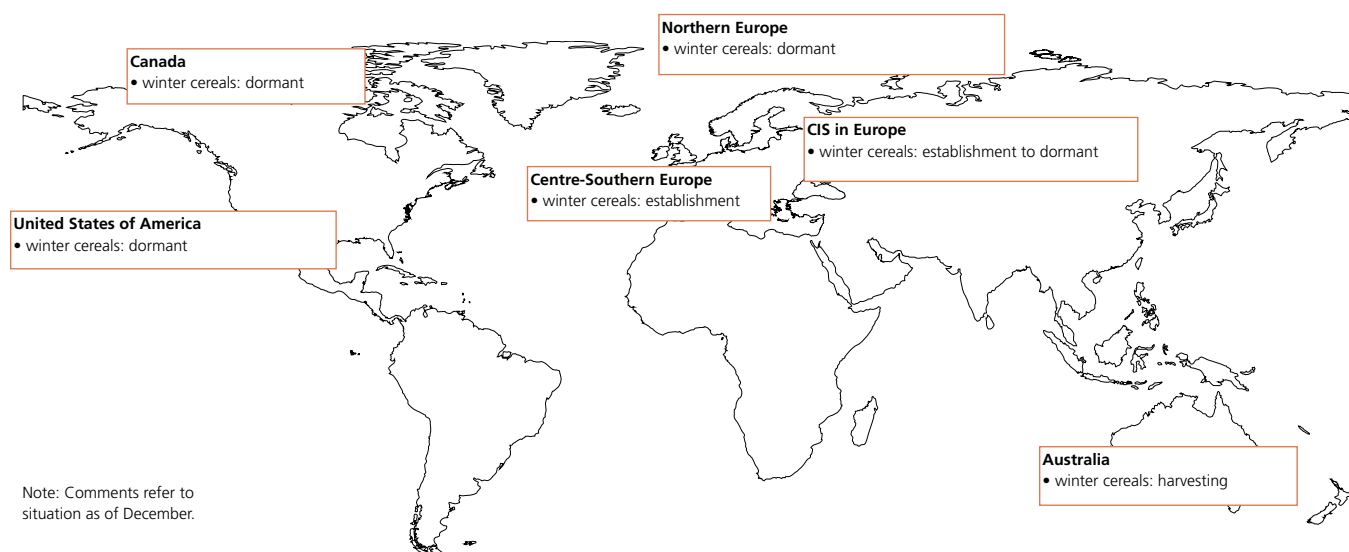
Prices for wheat and maize followed mixed trends but remained at relatively high levels supported by tight supplies and high export demand

Yellow maize prices followed mixed trends between September and November 2016, but were generally above year-earlier levels reflecting tight supplies as a result of the reduced maize harvests or high export demand. In **Argentina**, the further depreciation of the local currency and high export demand pressured prices upward during the period and, in November, prices were more than double the level compared to a year earlier. In **Brazil, Bolivia, Colombia** and **Peru**, maize prices trended downward between September and November, mainly reflecting the high influx of imports. However, with the exception of Colombia, maize prices in November remained generally above their levels from a year earlier. In **Chile** and **Ecuador**, seasonal trends and tight supplies pressured prices to move upwards in recent months.

Wheat grain and flour prices in the main subregional markets followed mixed trends in the past few months. In **Argentina**, wheat prices generally continued to be pressured by high export demand partly as a result of the removal of export controls and a weak national currency, and in November remained well above their year-earlier levels. Domestic wheat grain prices declined during the September-to-November period reflecting increased supplies from the 2016 harvest. By contrast, wheat flour prices increased over the same period, as local supplies remained tight reflecting large volumes of exports. In **Brazil, Bolivia, Chile, Ecuador** and **Peru**, prices of wheat grain and wheat flour, trended downward between September and November and were down from their year-earlier levels November, mainly reflecting increased imports supplies. In **Colombia**, prices generally fell in recent months due to higher import volumes, however, the weak local currency kept prices in November 2016 above their year-earlier levels.

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





NORTH AMERICA

Early indications suggest small contraction in winter wheat plantings for 2017 harvest

In the **United States of America**, winter wheat planting for the 2017 harvest was reported to be virtually complete by late November and with 58 percent rated as good to excellent, the condition ratings are a little above that at the same time last year. Although the final estimates are not available yet, early indications suggest that because of low prices, plantings of winter wheat, which account for over 80 percent of the country's

total wheat area, are likely to be down again for the third year in succession and may be the lowest level for decades. Regarding coarse grains, the latest official estimate puts the 2016 maize output at almost 387 million tonnes, 11.9 percent up from last year's crop and a new record, above the previous high set in 2014. In **Canada**, the bulk of the wheat crop is planted in the spring and the 2017 crop will not be sown until March-April next year. Latest information regarding the 2016 cereal harvest puts the total wheat output at 31.5 million tonnes, a sharp 14 percent recovery from the previous year's reduced crop. However, because wet conditions have delayed harvesting, there are concerns over the quality of this year's crop.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
North America	84.6	83.7	94.4	399.6	393.0	429.8	10.1	8.7	10.6	494.3	485.5	534.9	10.2
Canada	29.4	27.6	31.5	22.1	25.7	25.4	0.0	0.0	0.0	51.5	53.3	56.9	6.7
United States	55.1	56.1	62.9	377.6	367.3	404.4	10.1	8.7	10.6	442.8	432.1	477.9	10.6
Europe	249.0	256.7	250.1	272.2	238.9	248.1	4.0	4.2	4.3	525.2	499.9	502.6	0.5
Belarus	2.9	2.9	2.6	6.1	5.3	4.9	0.0	0.0	0.0	9.0	8.2	7.5	-8.6
European Union	157.1	160.5	144.0	171.7	151.0	153.7	2.9	3.0	3.1	331.7	314.5	300.7	-4.4
Russian Federation	59.7	61.8	72.0	42.4	39.5	42.2	1.0	1.1	1.2	103.1	102.4	115.4	12.6
Serbia	2.3	2.4	2.4	7.7	5.9	5.9	0.0	0.0	0.0	10.0	8.3	8.3	0.5
Ukraine	24.1	26.5	26.1	39.7	33.4	37.1	0.1	0.1	0.1	63.8	60.0	63.3	5.6
Oceania	24.1	24.5	28.4	12.3	13.4	14.4	0.8	0.7	0.3	37.2	38.6	43.1	11.5
Australia	23.7	24.2	28.1	11.7	12.9	13.8	0.8	0.7	0.3	36.3	37.7	42.2	11.7

Note: Totals and percentage change computed from unrounded data.

OCEANIA

European Union**Early indications suggest little change in European Union's winter wheat area for harvest in 2017**

As of late November, the bulk of the winter grain crops for harvest in 2017 had been sown throughout the **European Union**. Conditions have generally been favourable although dryness delayed planting somewhat in **France**. Early indications suggest that the overall area sown to winter wheat is similar to that in the previous year. Despite poor returns for wheat, the situation for alternative crops is no more attractive, therefore, a similar distribution of land among crops is expected as in the previous year. The European Union's cereal output in 2016 is now estimated at some 300 million tonnes, 4.4 percent down from 2015, largely due to a drop in wheat production to the lowest level in three years. Output slumped particularly in France due to unfavourable weather.

CIS in Europe**Plantings for 2017 winter cereal crop estimated to expand**

Planting of the winter cereal crops, to be harvested in 2017, is virtually complete in the *European CIS* countries. In the **Russian Federation**, the planted-area target of 17.3 million hectares for winter crops, the bulk of which is wheat, was achieved by the end of November and is 1 million hectares higher than the corresponding period last year. Following generally above-average precipitation, soil moisture levels are reported to be adequate and winter crop conditions are favourable.

In **Ukraine**, winter cereal planting is almost complete. After some delays due to heavy rains at the beginning of the planting season, sowings proceeded normally and the planted area nearly reached the official target by the end of November. The official target for wheat is set at 6.2 million hectares, approximately 3 percent up on last year. In **Belarus** and the **Republic of Moldova**, the area planted for winter cereals is estimated to be close to last year's level.

Cereal harvest estimated at record high in 2016

Harvesting of the 2016 cereal crop is virtually complete. The subregional's aggregate cereal output is estimated at a record level of 189 million tonnes, about 9 percent up on the 2015 level. The estimated increase in cereal production mainly results from a bumper wheat output, estimated at 102 million tonnes, up 11 percent from last year's already high level.

In the **Russian Federation**, total cereal production is forecast at 115 million tonnes, 13 percent up from 2016. The wheat

output is projected to reach a record high of 72 million tonnes, 17 percent higher than last year as a result of better yields and the increase in area planted. However, the share of milling quality wheat is reported to be lower than last year. Maize production, which has increased in the last years, is estimated at 14.1 million tonnes, up 4 percent from 2015. Similarly, the estimate for the barley crop stands at 18.7 million tonnes in 2016, 7 percent up from last year.

The aggregate cereal production is also estimated to increase in **Ukraine**. Despite drought conditions during the planting of winter cereals, the total cereal output is estimated at 63 million tonnes, almost 6 percent higher than in 2015. The wheat crop accounts for about 40 percent of the total harvest, and is estimated at 26.1 million tonnes, just 2 percent below the previous year's record. The minor reduction in wheat output was more than offset by a 10 percent production gain for maize, estimated at 26 million tonnes and a 15 percent increase in barley production, reflecting an increased planted area.

Cereal production in the **Republic of Moldova** is estimated to increase by almost 30 percent from last year due to better yields. Of this total, wheat production is estimated at 1.3 million tonnes, a rebound of 40 percent from last year and the largest output in the last five years.

By contrast, cereal production in **Belarus** is expected to decline to 7.5 million tonnes. Unfavourable weather conditions during crop development negatively affected yields, leading to a 9 percent year-on-year decline in cereal production.

Record 2016 cereal production anticipated to boost exports

Cereal exports in the 2016/17 marketing year (July/June) are expected to reach 76 million tonnes, about 2 million tonnes (3 percent) above the previous year's volume. This increase is mainly attributed to the expectations of increased wheat shipments from the Russian Federation and larger volumes of maize exports from Ukraine. In the **Russian Federation**, total exports are projected at 37 million tonnes, of which 28.5 million tonnes is wheat. In **Ukraine**, maize shipments are set at 18 million tonnes, a 5 percent increase on a yearly basis, while wheat export are expected to decline by 11 percent.

Shortage of milling quality wheat results in price increases

Despite the record crop production in the subregion, a shortage of high quality wheat led to an increase in export and domestic prices of milling wheat in the main exporters.

Export prices of wheat increased by more than 4 percent in November, supported by demand from importers and pressured by higher international prices. In the **Russian Federation**, domestic prices of milling wheat grew by more than 2 percent in

November; despite a record harvest in the country as the share of milling quality wheat is smaller this year. In **Ukraine**, domestic wheat prices were rising over last three months due to a reduced wheat harvest. Similarly, reflecting a lower production in 2016, prices of wheat flour in **Belarus** rose in November and were more than 7 percent higher than a year earlier. By contrast, in the **Republic of Moldova** wheat prices declined slightly, as a result of a bumper crop this year.

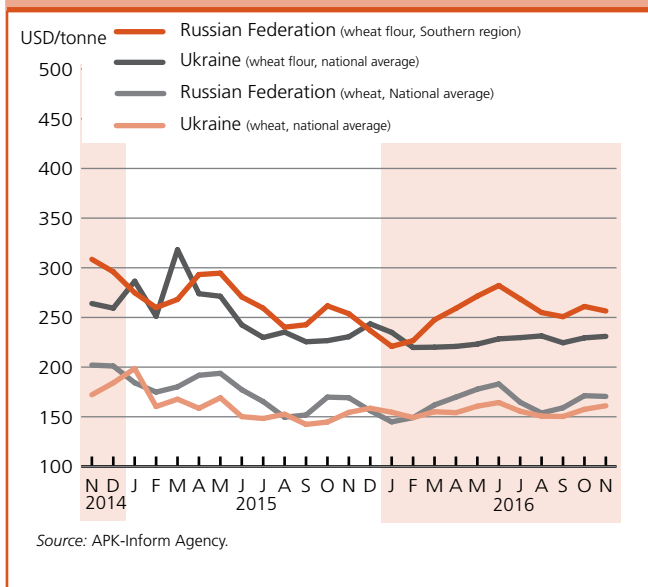
OCEANIA

Good prospects for 2016 winter grains harvest despite some frost losses

Prospects for the upcoming winter grains harvest in **Australia** are generally favourable with production of wheat set to reach a five-year high at some 28 million tonnes. Some Western Australian crops were damaged by severe frosts earlier in the season but nonetheless, with plentiful rainfall in other major producing areas for this year's crop, good yields are expected to boost the output. Regarding sorghum, the main summer cereal, plantings for the crop for harvest in 2017 are estimated to be down by

7 percent reflecting a sharp reduction in sorghum prices in 2016 and expectations that cotton will offer relatively higher returns in 2017.

Figure 11. Wholesale wheat and wheat flour prices in Russian Federation and Ukraine



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Table A1. Global cereal supply and demand indicators

	Average 2009/10 - 2013/14	2012/13	2013/14	2014/15	2015/16	2016/17
1. Ratio of world stocks to utilization (%)						
Wheat	27.8	24.9	26.1	29.6	30.9	32.3
Coarse grains	17.7	15.6	18.1	20.6	19.8	19.1
Rice	31.5	33.5	35.1	35.3	34.1	33.5
Total cereals	23.4	21.8	23.7	26.0	25.8	25.6
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	118.1	108.2	121.6	122.8	122.3	120.0
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	18.2	14.3	14.0	16.9	16.4	17.6
Coarse grains	11.4	8.2	10.5	12.9	11.6	13.3
Rice	25.0	27.8	28.9	24.2	19.2	17.6
Total cereals	18.2	16.8	17.8	18.0	15.8	16.2
	Annual trend growth rate 2006-2015	2012	Change from previous year		2015	2016
			2013	2014		
4. Changes in world cereal production (%)						
	2.6	-2.2	9.9	1.8	-1.2	1.7
5. Changes in cereal production in the LIFDCs (%)						
	2.1	3.7	1.1	3.1	-5.2	4.7
6. Changes in cereal production in the LIFDCs less India (%)						
	2.7	5.3	0.6	6.7	-3.7	2.4
	Average 2009-2013	2012	Change from previous year (%)		2015	2016*
			2013	2014		
7. Selected cereal price indices:						
Wheat	184.3	-4.8	-4.9	-6.6	-20.5	-13.5
Maize	227.6	2.2	-12.9	-25.8	-11.8	-6.4
Rice	237.4	-4.6	0.8	0.8	-10.5	-8.3

Notes:

Utilization is defined as the sum of food use, feed and other uses.

Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains.

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

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

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

Price indices: The Wheat Price Index has been constructed based on the IGC Wheat Price Index, rebased to 2002-2004=100; for maize, the U.S. maize No.2 Yellow (delivered U.S. Gulf ports) with base 2002-2004=100; for rice, the FAO Rice Price Index, 2002-2004=100, is based on 16 rice export quotations.

*January-November average.

Table A2. World cereal stocks¹
(million tonnes)

	2012	2013	2014	2015	2016 estimate	2017 forecast
TOTAL CEREALS	551.0	529.2	592.3	655.8	661.2	670.4
Wheat	196.9	172.5	183.9	211.8	226.5	238.5
held by:						
- main exporters ²	69.5	49.3	51.7	63.3	64.4	70.6
- others	127.4	123.2	132.2	148.5	162.1	167.9
Coarse grains	207.7	195.3	235.6	269.4	263.6	261.2
held by:						
- main exporters ²	74.5	54.9	80.7	101.0	91.6	106.1
- others	133.2	140.4	154.9	168.4	172.0	155.1
Rice (milled basis)	146.5	161.4	172.8	174.7	171.0	170.7
held by:						
- main exporters ²	41.3	46.6	49.5	43.3	33.9	30.9
- others	105.2	114.8	123.3	131.4	137.1	139.8
Developed countries	154.6	118.9	138.1	165.3	166.5	193.7
Australia	9.0	6.6	5.9	6.4	6.9	8.1
Canada	9.4	8.2	15.1	10.4	9.9	10.6
European Union	32.6	24.4	29.5	36.1	35.4	32.6
Japan	5.5	6.2	5.6	5.2	5.0	5.0
Russian Federation	15.9	6.7	6.8	8.6	6.9	13.3
South Africa	2.6	2.5	1.7	3.3	3.6	2.1
Ukraine	10.6	5.9	8.6	10.4	6.2	5.1
United States	49.3	44.2	51.4	69.0	76.2	97.9
Developing countries	396.4	410.3	454.1	490.5	494.7	476.6
Asia	330.1	353.5	381.0	403.0	410.0	401.9
China	198.0	216.7	238.5	257.5	279.9	282.0
India	50.4	52.2	52.9	52.3	42.7	39.6
Indonesia	10.5	11.2	10.9	9.9	9.5	9.2
Iran (Islamic Republic of)	1.5	3.6	3.5	6.6	6.4	5.4
Korea, Republic of	3.7	3.3	3.7	3.9	4.3	4.9
Pakistan	6.0	4.2	4.8	6.2	5.2	4.8
Philippines	2.9	3.1	3.1	3.9	3.6	3.7
Syrian Arab Republic	3.5	2.6	2.2	1.4	1.6	0.9
Turkey	4.5	4.6	5.7	5.1	5.0	3.2
Africa	37.8	35.1	38.3	43.3	45.2	41.1
Algeria	3.1	3.5	5.1	5.4	6.2	5.8
Egypt	7.9	5.5	6.2	6.2	6.4	6.4
Ethiopia	2.0	1.9	1.7	2.7	2.8	2.8
Morocco	4.8	3.4	5.5	5.2	8.9	5.8
Nigeria	2.1	1.4	1.4	1.9	1.2	1.2
Tunisia	0.8	1.3	1.1	1.3	1.1	1.0
Central America	5.6	5.6	6.6	7.5	9.0	9.4
Mexico	2.3	2.6	3.3	3.6	4.6	5.2
South America	22.6	15.7	27.9	36.3	30.1	23.8
Argentina	4.8	2.1	5.8	10.3	7.9	7.9
Brazil	9.5	6.1	12.0	15.2	9.9	3.8

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

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

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

Table A3. Selected international prices of wheat and coarse grains
(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
Monthly						
2014 - November	280	236	252	178	179	197
2014 - December	289	261	251	178	197	217
2015 - January	262	233	254	176	184	231
2015 - February	252	221	241	174	178	230
2015 - March	250	219	228	173	169	226
2015 - April	239	209	225	172	168	223
2015 - May	231	199	228	166	168	217
2015 - June	242	211	226	170	173	224
2015 - July	238	208	229	179	176	223
2015 - August	216	190	227	163	160	180
2015 - September	218	195	223	166	161	177
2015 - October	221	208	223	172	164	182
2015 - November	211	201	210	166	167	173
2015 - December	212	191	193	164	166	170
2016 - January	213	192	194	161	161	165
2016 - February	205	189	194	160	167	165
2016 - March	207	189	192	159	163	161
2016 - April	201	193	199	164	170	162
2016 - May	193	189	202	169	187	153
2016 - June	198	186	210	181	197	170
2016 - July	188	168	210	161	179	147
2016 - August	188	157	215	150	177	140
2016 - September	188	158	201	148	170	141
2016 - October	193	164	184	152	174	146
2016 - November	191	167	176	152	178	143

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2015/16 or 2016 estimates
(thousand tonnes)

	Marketing year	2014/15 or 2015			2015/16 or 2016	
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Imports position ² (commercial and aid)
AFRICA		31 291.3	1 034.9	32 326.2	32 159.2	17 931.1
East Africa		9 898.1	560.9	10 459.0	10 670.8	5 789.7
Burundi	Jan/Dec	147.4	3.0	150.4	164.9	32.9
Comoros	Jan/Dec	70.0	0.0	70.0	56.0	6.6
Djibouti	Jan/Dec	217.0	3.5	220.5	231.0	440.7
Eritrea	Jan/Dec	427.0	0.0	427.0	437.3	10.0
Ethiopia	Jan/Dec	1 700.0	111.5	1 811.5	1 620.0	1 144.9
Kenya	Oct/Sep	2 640.5	94.6	2 735.1	2 512.6	1 577.0
Rwanda	Jan/Dec	126.2	2.6	128.8	116.0	49.5
Somalia	Aug/Jul	590.0	58.0	648.0	710.0	239.9
South Sudan	Nov/Oct	n.a.	n.a.	545.0	555.0	n.a.
Sudan	Nov/Oct	1 955.9	257.3	2 213.2	2 820.0	1 275.2
Uganda	Jan/Dec	317.4	20.8	338.2	498.0	187.6
United Republic of Tanzania	Jun/May	1 161.7	9.6	1 171.3	950.0	825.5
Southern Africa		2 662.1	55.5	2 717.6	2 891.3	2 180.1
Lesotho	Apr/Mar	226.5	5.0	231.5	192.0	70.3
Madagascar	Apr/Mar	543.7	7.4	551.1	492.8	100.8
Malawi	Apr/Mar	117.0	13.2	130.2	258.8	333.3
Mozambique	Apr/Mar	1 266.8	22.2	1 289.0	1 003.0	948.8
Zimbabwe	Apr/Mar	508.1	7.7	515.8	944.7	727.0
West Africa		16 977.4	269.2	17 246.6	16 827.0	8 961.7
Coastal Countries		12 872.5	146.3	13 018.8	12 544.0	6 622.5
Benin	Jan/Dec	361.0	6.0	367.0	387.0	880.5
Côte d'Ivoire	Jan/Dec	1 889.7	3.5	1 893.2	1 980.0	1 220.9
Ghana	Jan/Dec	1 090.3	7.8	1 098.1	1 346.0	925.5
Guinea	Jan/Dec	610.5	16.5	627.0	837.5	325.3
Liberia	Jan/Dec	275.0	77.0	352.0	402.0	145.6
Nigeria	Jan/Dec	8 020.0	0.0	8 020.0	7 050.0	2 792.3
Sierra Leone	Jan/Dec	351.0	35.0	386.0	306.0	84.5
Togo	Jan/Dec	275.0	0.5	275.5	235.5	248.0
Sahelian Countries		4 104.9	122.9	4 227.8	4 283.0	2 339.2
Burkina Faso	Nov/Oct	479.0	6.0	485.0	573.0	132.7
Chad	Nov/Oct	104.0	40.6	144.6	151.7	71.8
Gambia	Nov/Oct	141.0	11.5	152.5	209.8	121.5
Guinea-Bissau	Nov/Oct	88.0	6.3	94.3	134.3	4.9
Mali	Nov/Oct	366.2	9.7	375.9	399.2	262.1
Mauritania	Nov/Oct	514.5	10.0	524.5	459.0	444.1
Niger	Nov/Oct	468.2	36.8	505.0	526.0	144.8
Senegal	Nov/Oct	1 944.0	2.0	1 946.0	1 830.0	1 157.3
Central Africa		1 753.7	149.3	1 903.0	1 770.1	999.5
Cameroon	Jan/Dec	1 016.6	2.0	1 018.6	887.0	774.4
Central African Republic	Jan/Dec	52.0	23.0	75.0	75.0	12.0
Democratic Republic of the Congo	Jan/Dec	669.7	120.3	790.0	790.0	206.0
Sao Tome and Principe	Jan/Dec	15.4	4.0	19.4	18.1	7.1

Source: FAO

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

² Estimates based on available information as of October 2016.

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2015/16 or 2016 estimates
(thousand tonnes)

	Marketing year	2014/15 or 2015			2015/16 or 2016	
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Imports position ² (commercial and aid)
ASIA		19 106.8	493.9	19 600.7	22 894.2	19 111.5
Cis in Asia		4 137.8	0.5	4 138.3	4 387.2	3 869.5
Kyrgyzstan	Jul/Jun	570.8	0.3	571.1	521.2	42.3
Tajikistan	Jul/Jun	1 082.0	0.2	1 082.2	1 089.0	1 102.9
Uzbekistan	Jul/Jun	2 485.0	0.0	2 485.0	2 777.0	2 724.4
Far East		6 309.2	146.2	6 455.4	8 335.0	9 977.9
Bangladesh	Jul/Jun	5 271.0	15.0	5 286.0	5 629.6	4 537.9
Bhutan	Jul/Jun	90.4	1.0	91.4	73.0	5.3
Democratic People's Republic of Korea	Nov/Oct	309.5	100.2	409.7	694.0	163.1
India	Apr/Mar	38.7	0.0	38.7	724.2	4 808.9
Mongolia	Oct/Sep	67.8	0.0	67.8	243.4	223.2
Nepal	Jul/Jun	531.8	30.0	561.8	970.8	239.5
Near East		8 659.8	347.2	9 007.0	10 172.0	5 264.1
Afghanistan	Jul/Jun	2 161.0	16.0	2 177.0	2 832.0	1 861.7
Syrian Arab Republic	Jul/Jun	2 278.8	281.2	2 560.0	2 940.0	832.0
Yemen	Jan/Dec	4 220.0	50.0	4 270.0	4 400.0	2 570.4
CENTRAL AMERICA AND THE CARIBBEAN		1 896.5	76.4	1 972.9	2 248.1	1 621.0
Haiti	Jul/Jun	580.0	68.1	648.1	669.1	409.5
Honduras	Jul/Jun	869.4	5.5	874.9	1 014.0	888.1
Nicaragua	Jul/Jun	447.1	2.8	449.9	565.0	323.4
OCEANIA		472.6	0.0	472.6	480.6	215.5
Papua New Guinea	Jan/Dec	415.2	0.0	415.2	420.2	203.9
Solomon Islands	Jan/Dec	57.4	0.0	57.4	60.4	11.6
TOTAL		52 767.2	1 605.2	54 372.4	57 782.1	38 879.1

Source: FAO

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

² Estimates based on available information as of October 2016.

Table A5. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2016/17 estimates*
(thousand tonnes)

Marketing year	2015/16 Actual imports			2016/17		
	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Imports position ² (commercial and aid)	
AFRICA	4 803.3	19.2	4 822.5	8 515.6	191.8	
Eastern Africa	2 642.4	0.0	2 642.4	4 482.6	0.0	
Kenya	Oct/Sep	1 577.0	0.0	1 577.0	2 725.0	0.0
Somalia	Aug/Jul	239.9	0.0	239.9	750.0	0.0
United Republic of Tanzania	Jun/May	825.5	0.0	825.5	1 007.6	0.0
Southern Africa	2 160.9	19.2	2 180.1	4 033.0	191.8	
Lesotho	Apr/Mar	70.3	0.0	70.3	283.0	66.2
Madagascar	Apr/Mar	93.1	7.7	100.8	488.0	0.0
Malawi	Apr/Mar	330.2	3.1	333.3	816.0	0.0
Mozambique	Apr/Mar	947.5	1.3	948.8	1 131.0	37.3
Zimbabwe	Apr/Mar	719.9	7.1	727.0	1 315.0	88.3
ASIA	11 437.6	131.5	11 569.1	16 213.8	0.2	
CIS in Asia	3 869.5	0.0	3 869.5	4 241.2	0.0	
Kyrgyzstan	Jul/Jun	42.3	0.0	42.3	572.2	0.0
Tajikistan	Jul/Jun	1 102.9	0.0	1 102.9	932.0	0.0
Uzbekistan	Jul/Jun	2 724.4	0.0	2 724.4	2 737.0	0.0
Far East	5 001.3	4.6	5 005.9	6 155.6	0.2	
Bangladesh	Jul/Jun	4 537.6	0.3	4 537.9	5 195.0	0.0
Bhutan	Jul/Jun	5.3	0.0	5.3	78.0	0.0
Mongolia	Oct/Sep	223.2	0.0	223.2	70.8	
Nepal	Jul/Jun	235.2	4.3	239.5	811.8	0.2
Near East	2 566.8	126.9	2 693.7	5 817.0	0.0	
Afghanistan	Jul/Jun	1 861.7	0.0	1 861.7	2 932.0	0.0
Syrian Arab Republic	Jul/Jun	705.1	126.9	832.0	2 885.0	0.0
CENTRAL AMERICA	1 611.9	9.1	1 621.0	2 080.1	0.5	
Haiti	Jul/Jun	402.5	7.0	409.5	680.1	0.3
Honduras	Jul/Jun	886.5	1.6	888.1	865.0	0.0
Nicaragua	Jul/Jun	322.9	0.5	323.4	535.0	0.2
TOTAL	17 852.8	159.8	18 012.6	26 809.5	192.5	

Source: FAO

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

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

² Estimates based on available information as of October 2016.

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This report is based on information available as of November 2016.

Enquiries may be directed to:

Global Information and Early Warning System on Food and Agriculture (GIEWS)
Trade and Markets Division (EST)
Food and Agriculture Organization of the United Nations (FAO)
Viale delle Terme di Caracalla
00153 Rome - Italy
E-mail: GIEWS1@fao.org

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