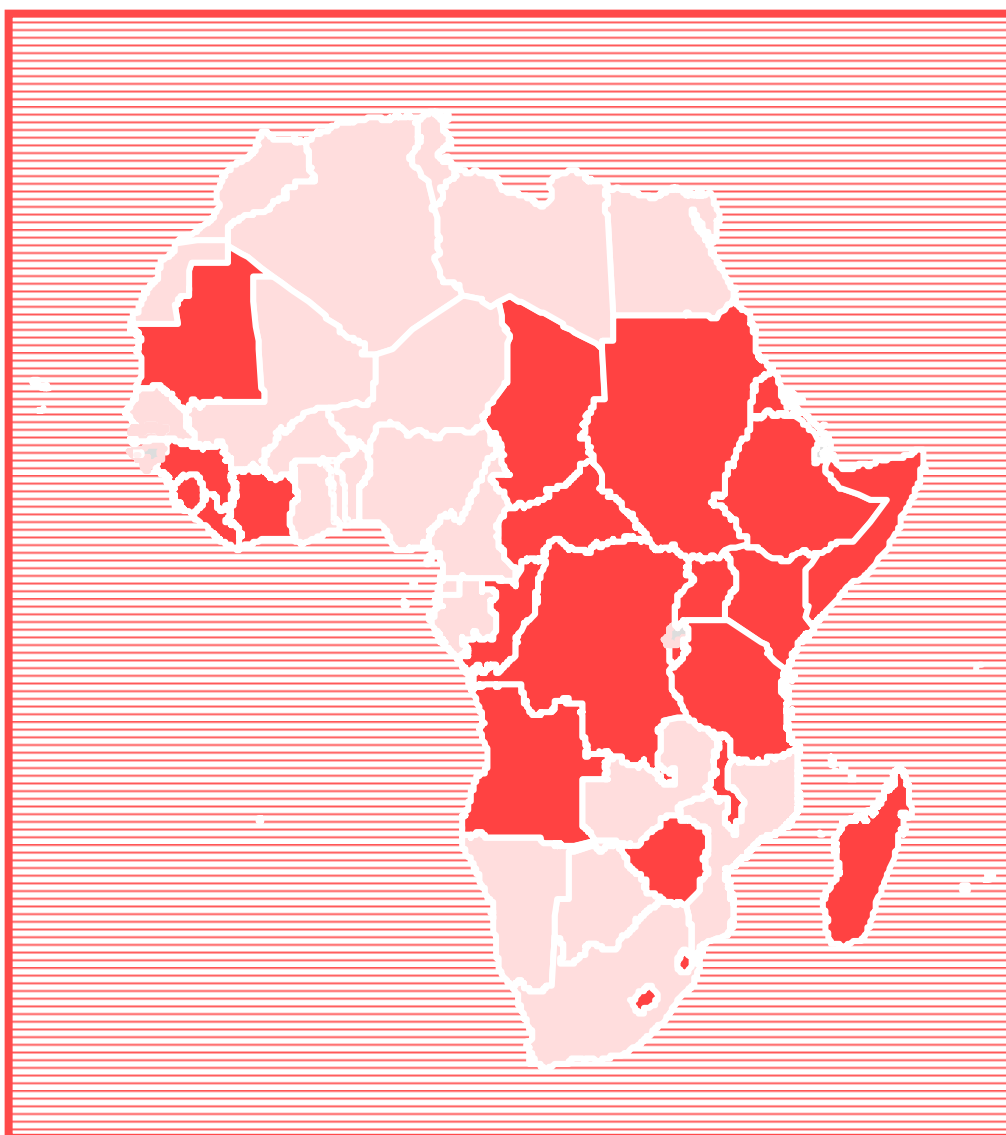


FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No. 1

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Countries facing food emergencies:

Angola, Burundi, Chad, Central Afr. Rep., Congo Dem. Rep. of, Congo Rep. of, Côte d'Ivoire, Eritrea, Ethiopia, Guinea, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mauritania, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania U. R., Uganda, Zimbabwe



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

This is the first issue for 2005 of this report prepared by the FAO Global Information and Early Warning System (GIEWS) on the food supply situation and cereal import and food aid requirements for all countries in sub-Saharan Africa. The report is designed to provide the latest analysis and information on the food situation in these countries to governments, international organizations and other institutions engaged in humanitarian operations.

In this introductory part, countries in the subregion facing serious food shortages are listed with principal causes of food insecurity. This is followed by the Highlights of the report.

Part I provides a country-by-country review of the food supply situation by subregion, as well as current crop prospects. The accompanying tables (Tables 1- 5) provide data on production, cereal import requirements and food aid needs. The information on food aid pledges, triangular transactions and local purchases is based on data transmitted to GIEWS as of mid-March 2005 by the World Food Programme.

Part II provides country cereal balance sheets (CCBS), highlighting cereal import and food aid requirements of individual countries, as well as other important data.

COUNTRIES FACING FOOD EMERGENCIES (Total: 23 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Returnees
Burundi	Civil strife, IDPs and returnees
Chad	Refugees
Central Afr. Rep.	Civil strife
Congo, Dem.Rep.	Civil strife, IDPs and refugees
Congo Rep. of	Civil strife, IDPs
Côte d'Ivoire	Civil strife, IDPs
Eritrea	Drought, IDPs, returnees
Ethiopia	Drought in parts, IDPs
Guinea	IDPs and refugees
Kenya	Drought in parts
Lesotho	Drought
Liberia	Civil strife, IDPs
Madagascar	Drought in southern parts
Malawi	Drought in parts
Mauritania	Drought, locusts
Sierra Leone	Returnees
Somalia	Civil strife, drought in parts
Sudan	Civil strife, drought in parts
Swaziland	Drought in parts
Tanzania, U.R.	Drought in parts, refugees
Uganda	Civil strife, IDPs, drought in parts
Zimbabwe	Adverse weather, economic disruption

Since conditions can change rapidly, and published information may not always represent the most up-to-date basis for action, enquiries or corrections should be directed to Henri Josserand, Chief, Global Information and Early Warning Service (ESCG), FAO, Rome (Fax: 39-06-5705-4495, E-mail: GIEWS1@FAO.ORG).

Please note that this report is also available on the Internet as part of the FAO World Wide Web (www.fao.org) at the following address: <http://www.fao.org/giews/>

HIGHLIGHTS

Eastern Africa

- The food situation in Sudan is very alarming in several parts, including Darfur in the west and areas in the south as a result of conflict, population displacements and drought.
- In Eritrea, food insecurity remains a serious problem due mainly to the impact of successive years of poor rains. Additional food aid pledges and deliveries are urgently needed in view of the lean season which begins in June.
- More food aid pledges are also needed in Ethiopia, notwithstanding recent increased deliveries and the start of the productive safety net programme.
- In Uganda, the food situation in Karamoja continues to deteriorate due to drought, and insecurity in northern and eastern parts continues to claim the lives of civilians.

Southern Africa

- Prolonged dry spells and reduced precipitation during the critical month of February have undermined crop prospects in several countries, including Namibia, Botswana, Lesotho, Swaziland and Zimbabwe.
- Better crop prospects are seen in much of Angola, northern Zambia, northern Malawi and northern Mozambique.
- The first official forecast of maize output in South Africa, the subregion's largest producer, is placed at 10.52 million tonnes representing an improvement of about 11 percent over the previous five year average.
- In Zimbabwe, vulnerable populations are particularly at risk during this critical lean period. Household food security remains precarious due to high unemployment, low purchasing power and unaffordable food commodities.
- The HIV/AIDS pandemic was named as a contributing factor in declaring a state of emergency in Lesotho and Swaziland; the disease is affecting the entire subregion.

Western Africa

- In the Sahel, high prices and shortages of millet in the areas that were affected by desert locusts and poor rainfall in 2004 are causing serious food security concerns.
- The food situation remains critical in Mauritania, the most affected country, where thousands of rural households are in need of emergency food assistance. Mauritania has faced several years of drought and poor harvests and the ability of a large number of people to cope with this situation has been exhausted.
- In Côte d'Ivoire, insecurity, labour shortages and a growing separation of the northern and southern halves of the country continue to disrupt agricultural production and marketing. Food production has been satisfactory in the south, but remains below average in the north and west. Smallholder cash crop producers are experiencing significant losses of income, and household food security has suffered from the disruption of livelihoods, especially in the west.
- In Guinea, Liberia and Sierra Leone, food assistance continues to be needed for internally displaced people and refugees.

Central Africa

- Harvesting of the first season (2005A) crops is now complete. Production estimates in Burundi indicate a decline of about 5 percent in total food production leading to a food deficit of 310 000 tonnes in cereal equivalent.
- In Rwanda, preliminary estimates indicate that about 30 000 tonnes of food aid would be required in 2005.
- Renewed disturbances in Burundi and Democratic Republic of Congo are a cause for concern especially for the resettlement of newly arrived/arriving IDPs and returnees.

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PART I: POSITION BY SUBREGION

SUB-SAHARAN AFRICA'S CROP CALENDAR

The harvesting of the 2004/05 cereal crops is about to begin in southern Africa. In eastern Africa, the main season crop is maturing in Tanzania, while elsewhere in the subregion planting of the main season crops has started except in Eritrea, Ethiopia and Sudan, where sowing is not due to commence for about two months. In central Africa and the coastal countries of western Africa planting has started, but in Sahelian countries it will not begin until June. The crop calendar of sub-Saharan Africa is indicated below.

Cereal crop calendar		
Subregion	Cereal crops	
	Planting	Harvesting
Eastern Africa ^{1/}	March-June	August-December
Southern Africa	October-December	April-June
Western Africa		
- Coastal areas (first season)	March-April	July-September
(second season)	August-September	November-December
- Sahel zone	June-July	October-November
Central Africa ^{1/}	April-June	August-December

^{1/} Except Burundi, Rwanda and the Democratic Republic of Congo which have two main seasons and Tanzania whose main season follows the southern Africa planting calendar. For Sudan, the planting period for the staple coarse grain crop is June-July and the harvesting period is October-December.

In **eastern Africa**, near to below normal rainfall is forecast over most parts during the March to May period which is an important rainy season over the equatorial parts of the region. Overall, the food security situation of a large number of people in the subregion is highly precarious.

In **Eritrea**, seasonal dry weather conditions prevailed in the main grain producing areas during January to March. The performance of the Bahri rains (October-February), important for crop and pasture development in the otherwise arid areas of the Northern Red Sea (NRS) Zone and the escarpments, was unsatisfactory.

Cereal production in 2004 was estimated by an FAO/WFP Crop and Food Supply Assessment Mission at about 85 000 tonnes, less than half the average of the previous 12 years. The cereal import requirement for 2005 is estimated at 422 000 tonnes, of which about 80 000 tonnes are anticipated to be imported commercially.

An estimated 2.3 million people, about two-thirds of the whole population - including in urban and peri-urban areas - will require food assistance in 2005. Recent reports indicate that malnutrition rates of 20-29 percent (GAM) have been recorded in parts of Gash Barka and Anseba. Food aid needs are estimated at 342 000 tonnes of which 104 000 tonnes have been pledged by mid-March. Further pledges are urgently needed ahead of the hungry season starting in June.

In **Ethiopia**, the planting of the 2005 secondary "belg" season crops has commenced in several locations after some rains were received in late-February/early-March. The "belg" crop accounts for around 8 to 10 percent of annual cereal and pulses production but in some areas it is the main harvest.

A joint FAO/WFP Crop and Food Assessment Mission that visited the country late last year estimated the cereal and pulse production from the 2004 "meher" season at 14.27 million tonnes, 24 percent above the previous year's revised estimates and 21 percent above the average of the previous five years. Extended rainfall, increased fertilizer use (up by 20 percent) and a 30 percent increase in the use of improved seeds, especially maize and wheat, boosted average yields in key production areas.

Despite the good harvest, some 2.2 million acutely food-insecure people will require emergency food assistance to meet minimum food requirements in 2005. In addition, some 683 000 people in Somali Region and 250 000 people in Afar Region, who will eventually be covered under the safety-net programme, will require emergency food assistance for the first half of 2005. Total emergency food needs in 2005 are, therefore, estimated at 387 500 tonnes plus 89 000 tonnes of targeted supplementary food distributions to 700 000 children under five and 300 000 pregnant and lactating women. Recent reports indicate that the food situation has improved in several drought-affected areas with increased emergency food aid pledges and deliveries, and the start of the productive safety net programme (PSNP) in mid-February, six weeks later than planned. A recent Cereal Availability Study (CAS) conducted by the Swedish International Development Agency, the World Food Programme and the Delegation of the European Commission to Ethiopia concluded that 355 000 tonnes of wheat, maize and sorghum are available on the local market and could be purchased without creating significant price hikes for consumers.

In **Kenya**, the 2005 main "long rains" cropping season has begun. Early forecasts indicate near normal to above normal rainfall over central and southern Kenya while near normal to below-normal rainfall is forecast over much of the rest of the country. Harvesting of the 2004/05 secondary "short rains" cereal crop, which normally accounts for some 15 percent of annual production, is complete and a below average 270 000 tonnes of maize is gathered. This crop provides the main source of food in parts of Central and Eastern provinces. The 2004 main "long rains" cereal crop, harvested until last October, was significantly reduced compared to the previous year due to erratic rainfall. The aggregate 2004/05 cereal production is now estimated at about 2.5 million tonnes, compared to 3.1 million tonnes in 2003/04.

Food shortages in some of the drought-affected marginal agricultural districts of Eastern Province have eased following a relatively improved short-rains harvest. However, in the lowlands of Kitui, Makueni and most of the coastal districts the food situation remains serious. In addition, pastoralists and agro-pastoralists in Kajiado District continue to face extreme food shortages despite scattered showers in February. The impact of earlier successive poor seasons has also left a large number of households highly vulnerable and unable to cope with continued losses of livestock and livelihood options.

In **Somalia**, the output of the recently harvested secondary "deyr" season cereal crop in the south is estimated at 122 000 tonnes, 21 percent above the post-war average. Normally the deyr season accounts for 25-30 percent of annual cereal production; however, this year it contributed about 46 percent. The aggregate 2004/05 cereal production is estimated at about 264 000 tonnes, about 7 percent below the post-war average. The overall food supply situation in parts of southern Somalia has improved with better "deyr" harvest. However, an estimated 500 000 people continue to experience serious food shortages and high malnutrition rates due to insecurity, previous high loss of livestock assets, poor rangeland conditions, high household debt and destitution. These people require immediate humanitarian assistance in the form of resource transfers and livelihood support. The Food Security Assessment Unit (FSAU) has indicated a revised national cereal shortfall of about 8 000 tonnes in 2004/05 (August/July) marketing year. Further information and analysis can be accessed at: www.unsomalialia.net under the FSAU web page.

The recent Asian tsunami has also affected a number of settlements in Somalia along a 650-km stretch of coastline between Hafun district and the town of Gara'ad in North Mudug region, Puntland State. The waves are estimated to have killed between 100-300 people and displaced 5 000 others. Fishing gear and equipment were lost in large quantities and hundreds of homes were destroyed or damaged, while fresh water wells and reservoirs became unusable. Up to 30 000 people are in need of relief assistance till the start of the next fishing season at the end of 2005.

In **Sudan**, the first week of January 2005 brought some optimism as a peace deal was signed to end the war in southern Sudan. Since 1983, more than 2 million people have died and another 4 million have fled their homes. With a large number of returnees expected in the coming months, the humanitarian challenges and rehabilitation and reconstruction needs of the shattered economy and infrastructure will be enormous. The continued crisis in Greater Darfur, where fighting has forced more than 2 million people from their homes and farms, is another huge humanitarian challenge. Reports paint a grim picture where the conflict has engulfed almost all parts of Greater Darfur, making it very difficult for agricultural activities and humanitarian assistance.

Increasingly serious food shortages are now reported in several parts of the country. There have been increased population movements into northern Bahr El Gazal Region, marking the onset of a complex range of resettlement challenges for both the returnees and their hosts.

In the **United Republic of Tanzania**, the short rains maize crop is expected to be average in most parts of Mara and Mwanza in the Lake Victoria region, while output has been above average in the Kagera region. As more short rains maize crop reaches the market, average wholesale maize prices in the region and especially in Mwanza have dropped from US\$ 186 per tonne in December 2004 to US\$ 150 per tonne in February 2005. As harvesting extends throughout the Lake Victoria region during March, prices are expected to decrease further.

Elsewhere, in northern Tanzania including Arusha, Manyara and parts of Kilimanjaro the maize crop is expected to be below normal. Harvesting has begun in these areas and average wholesale prices in the main export collection market of Himo have declined from US\$ 214 per tonne in January to US\$ 182 per tonne in February 2005. Tanzanian maize flow into Kenya is expected to increase in the third quarter of 2005. Recorded maize exports from Tanzania to Kenya in February were around 7 000 tonnes compared to 6 790 tonnes in January 2005.

The climate outlook for the March-May 2005 season is for near-normal to below-normal rainfall over southern and south-western Tanzania while near-normal to above-normal rainfall is forecast for central and northern Tanzania

In **Uganda**, the medium term forecast for March to May 2005 indicates near normal to below normal rainfall for most of the country while near normal to above normal rainfall is forecast for south-western parts of the country. Harvesting of the 2004/05 second season food crops is complete. The harvest has improved food security by replenishing household stocks and market supplies. The flow of crops to major markets, including conflict affected areas, is normal. However, prices are relatively high following the reduced 2004 main season food crops and are yet to respond to the ongoing harvest.

The civil strife in northern Uganda, despite reduced rebel attacks in recent months, continues to severely constrain the food situation of the population. Over 1.4 million displaced persons sheltering in over 100 congested protected camps continue to depend on WFP food assistance for survival. Food security continues to worsen in Karamoja, where drought-affected people are increasingly relying on wild foods, migrating to towns and selling livestock at low prices. WFP faces a shortfall of 53 824 tonnes of food commodities with a funding gap of US\$ 33 million, required to maintain the food pipeline necessary to continue providing relief assistance to IDPs and refugees through September.

In **southern Africa**, prospects for the 2005 coarse grains crops, to be harvested in April-May, are mixed at this point with below normal harvest expectations in the southern part of the region, namely Namibia, Botswana, Lesotho, Swaziland, and Zimbabwe, and normal to above normal in the northern parts of the subregion. Significant amount of precipitation during February, the most critical month for maize grain formation, was received in Angola, northern Zambia, northern Malawi and northern Mozambique. On the other hand, prolonged dry spells in southern Zambia, southern Zimbabwe and central and southern Mozambique could limit the yields locally. The first official forecast of maize output, the principal staple crop, in South Africa, the subregion's largest producer, is placed at 10.52 million tonnes, representing an improvement of about 11 percent over the previous five year average. Reduced cereal harvests in 2004 in Lesotho, Swaziland and Zimbabwe have caused food shortages in these countries with varying degrees of severity. WFP has launched a three-year regional Protracted Relief and Recovery Operation (PRRO) requiring US\$ 405 million and involving 656 573 tonnes of food commodities to assist food insecure and AIDS affected populations in the subregion.

In **Angola**, normal to above normal planting rains were received for the main season crops at the start of the 2004/05 agricultural season. However, lack of rain during the third dekad of February in southern Angola has left parts of the maize growing area vulnerable. But the northern half of the maize growing area (located in the centre of the country) is progressing well. The overall crop prospects this year look favourable. The 2004 cereal harvest was estimated at about 724 000 tonnes, about 9 percent over last year and 27 percent over the previous five year average. This was mainly the result of increased areas under cultivation, favourable weather, resettlement of many internally displaced people and refugees and substantial distribution of agricultural inputs. In spite of the good harvest in 2004, however, the country needed cereal imports of about 820 000 tonnes for 2004/05, of which 642 000 tonnes were expected to be in the form of commercial imports and 178 000 tonnes as emergency food aid.

Challenges to improving food production in the country include access to productive inputs such as draught animals, fertilizer and agriculture extension services. Recently the World Bank approved a grant of US\$ 21 million to Angola for implementing the HIV/AIDS, Malaria and Tuberculosis Control Project.

Angola's economy, which produces over 1 million barrels a day of crude oil that fetched more than double the budgeted price in the international market in 2004, is expected to boom with a Government prediction of 16 percent growth in 2005. Ironically, a large number of food insecure people exist in the country. WFP with its limited food distribution currently feeds about 850 000 vulnerable people, most of them internally displaced persons (IDPs). With the improvement in the security situation, large numbers of IDPs and refugees have returned to their areas of origin.

Satellite imagery analysis for **Botswana** suggests less than normal growth of the main season crops/vegetation in most parts of the country, except in the east where above average precipitation has been recorded. According to a Ministry of Agriculture statement, cereal plantings (mainly sorghum) are substantially reduced this year due to the erratic and insufficient rainfall. However, domestic cereal production in Botswana typically amounts to 5-10 percent of the country's total needs. The remainder is covered by commercial imports. The 2004 cereal production, mainly sorghum, was estimated to recover from the previous year's drought affected harvest to a more normal level of about 19 000 tonnes. Botswana's cattle industry has been battered by two successive outbreaks of foot-and-mouth disease that resulted in the death of over 16 000 animals during 2002 and 2003 and loss of access to European markets. The cattle industry is Botswana's second largest foreign currency earner after diamonds. Last month the Government unveiled a plan to battle and eventually eradicate this disease.

In **Lesotho**, sporadic and generally inadequate rainfall is a cause for concern as the country tries to recover from the multi-year drought. Although heavy rains were received in February, the cumulative precipitation this season has been substantially below normal. Planted area was reportedly reduced substantially in the southern part of the country due to lack of soil moisture. The food supply situation, especially during these lean months, remains very tight due to a 60 percent drop in cereal production in 2004 compared to the year before. Although much of the cereal import requirements can be covered on commercial basis, mainly from South Africa, lack of purchasing power for a large section of the population is a major problem. A joint FAO/WFP/Government mid-season crop assessment is currently underway.

Emergency food relief for 2004/05 marketing year (April/March) was estimated at 48 500 tonnes of cereals for the most vulnerable people affected by crop failure and HIV/AIDS. Since January 2005 a new regional Protracted Relief and Rehabilitation Operation (PRRO) of WFP is intended to benefit some 171 000 people.

In **Madagascar**, normal to above normal rains were received at the start of the 2004/05 agricultural season in October-November for planting of the main season crops (rice, maize and sorghum). Heavy rains were experienced in December and January. February, the most critical month for crop growth (especially for maize), has been relatively dry, adversely affecting potential crop yields this season. Judging from the satellite imagery the northern and central parts of the island received good rains during the first week of March. However, serious flooding was reported on 8th March in the eastern Alaotra region causing some damage to the standing paddy crop. The area planted to paddy is reported to have increased in response to the current high rice prices. The official estimate of paddy production in 2004 is 3 million tonnes, some 8 percent higher than the year before. Maize production was estimated at an average level of 170 000 tonnes, an increase of about 10 percent on the previous year's drought-reduced harvest. The impact of cyclones in 2004, rising cost of oil imports and depressed prices of its main exports such as vanilla and shrimp have caused serious food security problems for vulnerable groups. Since April 2004, rice prices have been on the rise. These prices may benefit farmers with marketable surpluses.

The rapid rise in the price of rice (for example, from 2 400 Fmg or about US\$ 0.25 per kg in April to about 7 000 Fmg or US\$ 0.74 in December) primarily due to high world prices and devaluation of the local currency, has seriously affected the food security of the country. Rice imports have declined sharply causing a "rice crisis" in the country. In June the European Union committed 70 million euros to its biggest ever African project to rehabilitate the main north-south road. In October the IMF announced disbursement of US\$ 16.6 million aimed at promoting economic growth and reducing poverty. Reportedly more than 75 percent of Madagascar's 16 million people live below the poverty line of US\$ 1 a day.

In **Malawi**, cumulative rainfall since the beginning of the current agricultural season started in October 2004 has been above normal in most areas of the country. However, significant dry spells are reported in the southern part of the country as causing serious damage to crops. Elsewhere, crop growth in general is considered satisfactory. Food supplies are readily available in the country and at relatively low prices due to unrestricted cross border trading with the neighbouring countries, especially Mozambique. In most markets, 2004 prices were consistently higher than the ADMARC subsidized corresponding prices in 2003. However, current maize prices are lower than during 2001. Maize prices have stabilized at around 17-20 MK/kg as a steady stream of cross border import flows from neighbouring Mozambique.

For the current marketing year 2004/05 (April/March) the Vulnerability Assessment Committee (VAC) estimated that about 1.3 million vulnerable people, including those in areas that experienced crop failures and those seriously affected by HIV/AIDS, would require emergency food assistance to the tune of 56 000 tonnes of cereals.

Domestic production of cereals in **Mauritius** amounts to less than 1 percent of total cereal needs; consequently the country imports commercially virtually its entire cereal consumption requirements. Sugarcane is grown on about 90 percent of the cultivated land area and accounts for 25 percent of the country's export earnings.

The anticipated loss of preferential access to US and European markets by 2007 is expected to have negative consequences for sugar and textiles, the two important exports of the country. For the last three years Mauritius has been experiencing a relatively high unemployment rate (in excess of 10 percent) according to the Economist Intelligence Unit, nearly double the average of 5.9 percent for 2000.

Mozambique has so far experienced a mixed weather pattern this season with heavy rains in the centre, and the north and sparse rains in the south. Heavy rains locally and in neighbouring Zambia at the end of January caused serious flooding along Zambezi and Pungue rivers, affecting 7 districts in central Mozambique. Some damage to the main staple food crops, maize and sorghum, and cash crop sugar cane, is expected. Southern Mozambique is experiencing a moisture deficit more than usual with drought-like conditions in and around the lower Limpopo Basin. Floods and drought notwithstanding, if the generally satisfactory crop growth trend in rest of the country were to continue, prospects for 2004/05 main season crops would be favourable.

The overall food security situation in the country is satisfactory. As reported by SIMA/MADER, maize retail prices have stabilized in most markets in the country and are currently consistently lower than during the same months in the previous two years. Vulnerability analysis indicated in April 2004 that some 187 000 people would need 49 000 tonnes of relief food in marketing year 2004/05 due to the impact of floods/droughts in the previous years and to cope with the HIV/AIDS problem. Since then, the food security situation has improved owing to a good agricultural performance during the second season.

In **Namibia**, according to the Namibia Early Warning and Food Information Unit (NEWFIU), the 2004/05 agricultural season started late and generally dry weather conditions have reduced prospects for a good harvest. It has also been reported that nearly all farmers in eastern Caprivi received emergency seed assistance at the start of the season. They also benefited from the government's extended draft animal power acceleration programme and Productivity Upliftment Micro Project which supplies ploughing implements and accessories. In 2004, despite heavy rains and flooding in Caprivi and Kavango, total cereal production was estimated by NEWFIU at 131 000 tonnes, 30 percent higher than the previous year's above average output. At the usual level of consumption, this resulted in about 150 000 tonnes of cereal import requirement, largely to be met by commercial suppliers.

In **South Africa**, with below normal and erratic rains, the 2004/05 agricultural season did not start very well. However, relief was brought by heavy precipitation in December, late January and mid-February in the maize triangle in the northeastern part of the country. Western Cape Province is experiencing a third year of drought in a row. Nationally, maize plantings this season are estimated at about 3 million hectares, more or less similar to last year. The first official estimate for the 2005 maize crop is put at 10.5 million tonnes, about 8 percent above last year.

The final official production estimate for the winter wheat crop harvested in October-November 2004, at 1.7 million tonnes, indicates an increase by about 10 percent over the previous year. This would translate into a

wheat import requirement for the year of around one million tonnes. The final estimate of the maize harvest for 2004 has been revised upwards by the country's Crop Estimation Committee (CEC) to 9.7 million tonnes. In spite of the much publicised drought in the country, this level of production is almost the same as the year before and even slightly better than the previous five year average.

With the expectation of a severe drought in the country in 2004, the SAFEX price of white maize had soared to US\$ 216/tonne in early February 2004, but has now declined to below US\$ 100/tonne (lowest level since mid-2001) with improved crop production locally and internationally and a substantial drop in the international price of maize.

In **Swaziland**, planting and growth of main season crops has been severely constrained by low and ill-distributed rainfall since the start of the season in October 2004. Short but heavy rains in December-January had a limited effect. According to the National Disaster Management Task Force, some damage to the maize crop was caused by hailstorm on 23 January. Thus the overall prospects for crops are considered as unfavourable. The food security situation in the country is precarious following a drought that caused 30 percent reduction in the 2004 harvest of main season cereals compared to the previous five-year average. With a self-sufficiency rate for cereals of only about a third, the Swazi population is mostly dependent on food imports.

With late onset of rains, planting of main crops in some areas in **Zambia** this season was delayed. The rains have picked-up since December with the northern half of the country receiving good rains. Reduced yields are expected in southern parts where below average rainfall with dry spells of up to two weeks were experienced. The overall prospects for summer crops are considered unfavourable. Similar to last year, the Government's subsidy programme for fertilizer and seed to selected farmers was also implemented this year. As a result of two consecutive good harvests, maize prices are reported to be below the ten-year average (FEWSNET).

The 2004 cereal production, estimated at 1.37 million tonnes, was 1 percent over the 2003 bumper harvest and about 23 percent above the average of the previous five years. Considering the country's total utilization needs and substantial carryover stocks, an export surplus of about 150 000 tonnes was estimated during the 2004/05 marketing year. According to the Ministry of Agriculture and Cooperatives, the area under mature cassava increased by 47 percent from 140 251 hectares in 2002/03 to 206 051 hectares in 2003/04 resulting in a production increase of 46 percent to about 1.4 million tonnes (fresh weight). The food security situation in the country is relatively good. With surplus maize available from the last two seasons, WFP intends to purchase locally 80 000 tonnes of maize in 2005 for its national and regional operations.

In **Zimbabwe**, planting of the main crops this agricultural season was delayed due to an erratic start of the rainy season. Most areas received good precipitation in December and in late January. However, a two weeks dry spell experienced almost throughout the country during the critical month of February is expected to have serious adverse effects on crop yields. Shortage of top dressing fertilizer is anticipated to exacerbate the already low productivity. Judging from the latest satellite images, vegetation coverage throughout the country is below normal, except for some northern districts where improved precipitation has been beneficial. Farmers were also reported to have faced shortages of fuel, spare parts and draught power. Thus, as last year, the overall prospects for the current season crops are unfavourable.

Reportedly, local maize purchases by the government's Grain Marketing Board (GMB) have been significantly lower than expected. The parallel market prices of maize at mid-December 2004 varied from Z\$ 830/kg in surplus areas (mostly in the north-central part of the country) to Z\$ 2 225/kg in peripheral deficit areas. These prices have risen from the average of Z\$ 280 to Z\$ 560 per kg during post-harvest period in April. The continuing hyper inflation, estimated at an annual rate of 149 percent in November 2004 (although it steadily declined from about 600 percent at the beginning of 2004), combined with extremely high levels of unemployment, greatly limit access to food for the most vulnerable population groups. According to the Vulnerability Assessment Committee (VAC), about 2.3 million people in rural areas alone are not able to cover their food needs, and likely as many in the urban areas.

In **western Africa**, seasonably dry conditions prevail, where in the Sahel the 2004 growing season was characterized by serious desert locust infestations combined with inadequate rainfall, which caused severe localised damage to crops and pastures, notably in the northern parts of most countries. Pastoral and agro-pastoral groups have been especially hard hit. Millet prices in the affected areas are reported to have risen significantly, and this will limit access to this main staple for vulnerable households. However, overall agricultural production in the nine Sahelian countries is estimated to be close to the past five years average.

By contrast, growing conditions have been generally favourable in the coastal countries along the Gulf of Guinea, where harvesting of the 2004/05 second maize crop has been completed. In Côte d'Ivoire, food security for many households continues to be hampered by the on-going conflict, while Liberia, Sierra Leone and Guinea remain heavily dependant on international assistance due to large numbers of IDPs and refugees.

In **Burkina Faso**, aggregate cereal output in 2004 was estimated by a joint FAO/CILSS Crop and Food Supply Assessment Mission at 3.06 million tonnes, some 14 percent lower than the record crop harvested in 2003 but still above the average for the previous five years. Output of sorghum, the most important cereal crop, decreased by 8 percent to 1.48 million tonnes. Millet and maize declined by 26 percent and 11 percent respectively to 881 000 tonnes and 594 400 tonnes. Output of fonio increased by some 22 percent to some 11 000 tonnes. Dry weather and Desert Locusts infestation caused severe damage to crops and pastures in the northern areas near the Mali border. Oudalan province was the most affected with losses estimated at nearly 100 percent for millet and 80 percent for pastures. In the northern region some 98 villages are reported to be at risk while in the centre-north the decline in production is estimated between 30 percent and 50 percent. Although national food supply was not significantly affected by the fall in production in the north, cereal prices have increased steeply in the localities affected by drought and desert locusts. The Government has organized cereal distribution in affected communities, which has helped slow down price increases and improve access to food.

In **Cape Verde**, the 2004 growing season was very unfavourable due to late and erratic rains combined with desert locust infestations. An FAO/CILSS Mission estimated the maize harvest at some 4 042 tonnes, only one third of last year's output and similar to the poor crops of 1997 and 1998. Production of beans and potatoes was also below normal. Although the country imports the bulk of its cereal consumption requirement even in good years, the rural population particularly in the semi-arid zones could be severely affected by the production shortfall.

In **Chad**, a joint FAO/CILSS/FEWSNET Mission last October estimated cereal production in 2004 at 1.038 million tonnes, about one-third lower than the previous year's good output. Production of sorghum and millet, the most important food crops, was estimated to have declined by 30 percent and 43 percent, respectively, to 0.4 million tonnes and 0.3 million tonnes. The reduction in production was mainly due to inadequate rains in September in some areas of the Sahelian zone. Losses due to Desert Locust infestation were not significant.

As of late February, the estimated number of Sudanese refugees in eastern Chad was 213 314. More accurate estimates will be available on completion of the joint WFP/UNHCR/partners registration exercise currently underway. WFP has prepared a new phase of EMOP 10327.0 for the period July 2005-December 2006 requiring 92 000 tonnes of food at an estimated cost of about US\$ 82 million.

In **Côte d'Ivoire**, conflict-induced problems, notably labour shortages due to populations displacements, the lack of agricultural support services in parts of the country, market segmentation, disruptions by insecurity, and excessive transport costs due to hefty levies at roadblocks, continue to disrupt agricultural production and marketing activities in the country. In addition, crops were affected in 2004 by poor rainfall in northern regions, preventing a significant agricultural recovery in spite of improved agricultural inputs distribution. The results of a crop assessment organized by the Government jointly with FAO and WFP in February 2005 indicate cereal production (rice, maize, millet and sorghum) in 2004 at about 1.57 million tonnes, slightly higher than in 2003, but still 7 percent below the average for the five years preceding the crisis. This is mainly due to shortages of inputs and the dry weather that affected cereal crops in the north. By contrast, aggregate production of roots/tubers and banana/plantain, produced mainly in the centre and south, has been estimated at about 5.9 million tonnes, close to the average for the five years preceding the crisis. Food production has been satisfactory in the south but remains below average in the north and the west.

In spite of reduced agricultural production since 2002, the overall food supply position remains adequate and inflation moderate, mainly due to sustained food imports in the government-held south and cross-border trade with Burkina Faso and Mali in the rebel-controlled north. However, food security for many households continues to be hampered by disruption of livelihoods especially in the west. In addition, due to the continuing unfavourable market situation, smallholder cash crop producers are experiencing a significant loss of income. Although cotton production in 2004/05 is estimated to have increased to some 400 000 tonnes, compared to 180 000 tonnes in the previous year, due mainly to improved input distribution to cotton farmers, there is still uncertainty regarding the marketing of the crop.

In **The Gambia**, a joint FAO/CILSS Mission in October estimated cereal production in 2004 at a record 239 000 tonnes, an increase of about 12 percent over the previous year's good crop and significantly above the average for the previous five years. Although grasshopper, blister beetle and striga infestations had been reported in several areas, overall damage to crops was limited. In spite of the recent desert locust invasion, the food position this year is expected to be satisfactory, reflecting the bumper harvest, including a good groundnut output. With the arrival of new harvests on the markets the price of coarse grains has declined.

In **Guinea**, harvesting of the 2004 paddy crop is complete and output is expected to be similar to previous year's crop. The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people were repatriated in 2004, bringing the total number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. Although the restoration of peace in Sierra Leone has resulted in a decrease in the number of refugees in Guinea, the country still hosts a large number of refugees. According to the results of a refugee verification exercise carried out by WFP in June 2004, 80 806 refugees are still living in the country (including 73 840 from Liberia; some 3 980 from Côte d'Ivoire and over 1 830 from Sierra Leone), in addition to some 80 000 IDPs and over 100 000 returnees from Côte D'Ivoire in 2002.

In **Guinea-Bissau**, an FAO/CILSS Crop Assessment Mission estimated the 2004 aggregate cereal production at some 208 000 tonnes, 72 percent above last year's level. Rice, the main crop, is estimated to have increased by 92 percent to about 127 000 tonnes. Commercial imports in 2004/05 (November/October) are forecast at 30 000 tonnes of rice and 15 000 tonnes of wheat. With food markets well supplied, prices of cereals are lower than those prevailing in the same period last year.

Guinea-Bissau faced a particularly difficult lean season in 2004 due to a steep rise in rice price in the country, due mainly to a decline in commercial imports caused by an increase in the world price. The low producer price of cashew, the main export of the country, has further limited access to food notably for farmers living in the structurally food deficit regions of Pirada and Pitche in the East, and Biombo and Cacheu in the North. Per caput cereal consumption is forecast to recover significantly in 2004/05 from its previous low level. However, the recent desert locust invasion may affect the production of cashew the main source of cash income for farmers.

In **Liberia**, harvesting of the 2004 paddy crop is complete. Although insecurity has prevented many farmers from cultivating, agricultural production is expected to recover somewhat from the previous year's very low level, reflecting the return of many displaced people following the end of the civil war. Paddy production in 2004/05 is estimated at 159 600 tonnes compared to 110 000 tonnes in 2003/04.

Since October 2004, UNHCR has organized repatriation of over 8 000 out of the 300 000 Liberian refugees scattered across West Africa. The UN disarmament programme was officially completed on 31 October as planned. By 6 November 2004, a total of over 96 325 ex-combatants had been disarmed and some 85 240 demobilized since December 2003. With the improvement of the security situation, WFP has extended its operation to 10 out of the 15 counties in the country. In 2004, WFP distributed a monthly average of 8 000 tonnes to feed 650 000 beneficiaries. Under the current PRRO, WFP estimates that nearly a third of the Liberian population may require food assistance. Accordingly, WFP plans to feed an average of 750 000 people between January to June 2005. However, the agency is facing a serious shortfall in resources and has been forced to distribute reduced rations.

Following a steep rise in rice prices in the country due to an increase in the world price, the Government has set up a special committee to recommend solutions to the high rice prices so as to stabilize the market. Subsidized sales of about 33 000 tonnes of rice donated by China were started in February.

In **Mali**, this is the dry season as normal. Aggregate 2004 cereal production has been estimated at about 2.99 million tonnes, which is 12 percent lower than the record crop harvested in 2003 but some 8 percent above the average for the previous five years. This was the result of drought and desert locust infestations that caused severe damage to crops and pastures in the north and along the border with Mauritania. Although national food supply was not significantly affected, and domestic production is expected to cover nearly all of the country's cereal utilisation requirement, cereal prices have been increasing in the localities affected by drought and desert locusts. According to the Government, more than one million people will require food assistance this year, notably in Mopti, Tombouctou and Gao.

In **Mauritania**, the food situation remains critical. A joint FAO/WFP/CILSS Crop and Food Supply Assessment Mission that visited the country last October, estimated 2004 cereal output at some 101 192 tonnes, about 44 percent below 2003 and 36 percent below the previous five years average. This was the result of drought and widespread desert locust invasion that caused severe damage to crops and pastures across the country. The diéri (rainfed) crops, which normally account for approximately 30 percent of the total national cereal harvest, were seriously damaged by both locusts and drought. Loss of millet, early sorghum and legumes was nearly total in all areas visited by the Mission. The mission estimated that 30 percent of rice crop in the large-scale irrigated sector - accounting for more than 90 percent of rice production and 50 percent of national cereal production in recent years - has been devastated by desert locusts but losses could be far greater if the swarms persisted into the grain filling stages. Pastures have been severely affected and early southern movement of livestock herds has already started. The country has already faced several years of drought and poor harvests and the ability of the Mauritians to cope with such a situation has been exhausted. Access to food is difficult for thousands of rural households and it will get worse if appropriate action is not taken to assist affected communities. The country could sink back into a food crisis similar to the one it faced in 2002/03.

In **Niger**, it is also the dry season as normal. An early end of the rains during the 2004 growing season affected cereal crops and pastures and contributed to the movement of Desert Locusts to crop areas. Out of 205 villages in Tahoua region, about 125 have reported crop damage due to locusts. The joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission has estimated the 2004 cereal production at 3.14 million tonnes, which is 12 percent lower than last year's good crop, but close to the average for the previous five years. However, due to the fall in grain output, some 3 million people in 3 000 villages are estimated to be at risk of food shortage. Following a steep increase in cereal prices in the localities affected by drought and desert locusts, the Government announced in mid-February that it would sell 67 000 tonnes of cereal from its food reserve stocks to improve access to food.

In **Senegal**, a joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission in October estimated the 2004 cereal production at some 1 132 700 tonnes, 22 percent lower than the 2003 record crop of about 1.4 million tonnes, but still close to the five-year average. The important millet crop was estimated to decrease by 40 percent to some 379 166 tonnes, while sorghum production was 30 percent down from the previous year. This decline was due to inadequate rainfall combined with severe Desert Locust infestations in several areas in the north and centre, including Matam, Saint-Louis, Thiès, Diourbel and Louga regions. By contrast, production of groundnut, the main cash crop, is up by 28 percent due to the substitution of millet and sorghum with groundnut by farmers and renewal of government incentive programmes including subsidizing maize and groundnut seeds and fertilizers. Moreover, the main groundnut producing areas were spared by both desert locusts and inadequate rainfall.

Millet prices have increased steeply in affected regions. Although the total cereal import requirement, estimated at 952 000 tonnes (mainly wheat and rice), is anticipated to be covered on commercial basis, millet prices are likely to remain high. In addition to food assistance to the most affected populations, many farming families will need seeds and other inputs for off-season agriculture, and even for the next main growing season. Pastoral and agro-pastoral groups have been especially hard hit. With scarce pasture and water, the southern movement of livestock herds has started earlier than usual. Assistance is needed to establish safe passage corridors for livestock and to vaccinate animals on their way to southern pastures.

In **Sierra Leone**, harvesting of the 2004 paddy crop is complete. Output is expected to further increase this year, reflecting an improved security situation, increased plantings following the return of refugees and farmers previously displaced, as well as improved availabilities of agricultural inputs.

The security situation in the country remains calm. The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people were repatriated in 2004, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. An estimated 1 million internally displaced people have also been resettled. However, 65 000 Liberian refugees are still living in the country.

In **Togo**, land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March-April. Aggregate cereal production in 2004 has been estimated at a record 879 700 tonnes, some 18 percent above average. As a consequence, imports of cereals in the marketing year 2005 are forecast to decline to about 165 000 tonnes, including re-exports.

In **central Africa**, civil strife and insecurity continue to undermine food security in several countries

In **Cameroon**, national cereal production is estimated to have increased significantly in 2004, according to official sources. However, in the northern regions located in the Sudano-Sahelian zone, dry spells and the poor distribution of rainfall during the growing season resulted in a serious decline in production. High prices are reported in these regions due to low supply of grain.

In **Central African Republic**, harvesting of the 2004 cereal crops is complete. The output is expected to recover somewhat, reflecting an improved security situation relative to the situation in 2003 and increased plantings following agricultural inputs distribution with the assistance of FAO in the localities which were adversely affected by the 2003 rebellion.

The inflation rate estimated at 7 percent in 2003 due to increased food prices resulting from transport disruptions, slowed down in 2004 with an improved security situation. It is expected to remain stable in 2005, which should improve access to food in the country. Although most of the 230 000 IDPs have returned home, an estimated 41 000 refugees from CAR are still living in Chad.

In **the Republic of Congo**, domestic cereal production covers about 3 percent of total cereal requirements; the balance is imported, mostly on commercial terms. In 2005 the import requirement of cereals, mainly wheat and rice, is estimated at some 268 000 tonnes, virtually unchanged from the previous year.

Following the peace agreement between the Government and the rebels in March 2003, the Government and several international organizations have set up a Disarmament, Demobilization and Reintegration (DDR) programme for former militiamen. Under the DDR 42 000 former combatants are to benefit from reintegration during 2004-2006. The last 3 250 displaced people who were still living in camps near Brazzaville returned home in April 2004. According to the UNHCR, the country hosts a large number of refugees from conflicts in neighbouring countries, including DRC Congolese, Angolans and Rwandans. The security situation remains volatile and hampers humanitarian aid.

In **the Great Lakes region**, harvesting of the first season (2005A) crops (maize, sorghum and beans) planted in September-October, is completed. A recent locally-organized FAO/WFP/UNICEF/Ministry of Agriculture assessment in Burundi has forecasted a 5 decrease in total food supply (in cereal equivalent) for 2005 as compared to 2004. Preliminary results of a similar assessment in Rwanda indicate that about 30 000 tonnes of food aid would be required in 2005. In Burundi this season, FAO distributed sweet potato cuttings to 7 500 vulnerable farmers and sorghum seeds to 75 400 households to help the process of farm resettlement. However, resettlement of returning refugees and the food security situation in the Great Lakes region as a whole continue to be hampered by sporadic violence and disturbances.

In **the Democratic Republic of Congo**, the relative improvement in the security situation since 2004 and assistance provided to the internally displaced persons (IDPs) and returning refugees have had some positive impact on agricultural activities in the affected areas. However, recent clashes in the eastern part of the country have displaced over 100 000 people, adding to the existing 3 million IDPs. Thus, insecurity for producers and traders (who are forced to pay unauthorized levies on their farm produce), shortages of basic inputs (such as improved planting materials, hand tools, fishing equipment and veterinary supplies) and the decrepit rural infrastructure (notably feeder roads) are the main constraints to food production and distribution. Furthermore, staple crops, namely, cassava and banana, this season have been severely damaged by pests and diseases.

Food insecurity affects over 70 percent of the total population of 57 million in DRC. Hence, the Government and the donor community, at the Round Table conference held in March 2004, confirmed agriculture sector rehabilitation as the cornerstone of their strategy for poverty reduction. The focus will be on two main components, addressing emergency needs on one hand and achieving the medium to long term rehabilitation on the other. Under the Minimum Partnership Program for Transition and Recovery, the donor community has pledged US\$ 6.86 billion over the next 4 years, of which US\$ 285 million are intended for agriculture. The country has also received US\$ 39 million from the IMF under the Poverty Reduction and Growth Facility.

In **Burundi**, harvesting of the first season crops is now completed. After a sporadic start of the season in September/October, heavy rains were experienced in December and January, except in the north and the

northeast of the country where dry weather is expected to have reduced the harvest substantially. Torrential rains in late January caused flooding which reportedly destroyed nearly 1 000 homes in the western part of the country. Preliminary results of a joint FAO/WFP/UNICEF/Ministry of Agriculture assessment forecast a slight increase (2 percent) in cereal production but 5 percent decrease in total food production, in cereal equivalent, in 2005 as compared to 2004. Planting of second season (2005B) crops should begin shortly.

Total cereal production for 2004 was estimated at 280 000 tonnes, about 3 percent higher than the year before. However, there was a decline in the production of legumes due to an early start of the dry season and in roots and tubers due to an outbreak of cassava mosaic virus; prices have increased considerably in some markets. Prices of staple foods have doubled since last August.

Insecurity continues to be reported in some areas of Bujumbura Rural province. Thus, the slow-moving peace process remains very fragile. Since March 2003 more than 150 000 refugees from Tanzania have returned to Burundi but nearly as many remain in Tanzania.

In **Rwanda**, harvesting of 2005A main season crops (beans, maize and sorghum) is also complete. The weather had been erratic for that season with below normal precipitation at the beginning, with heavy rains in early December and early January but below normal in February, resulting in reduced overall cumulative precipitation for the country. Consequently, crop prospects are considered as not good. FEWSNET reported higher prices for several important food commodities in 2004 as compared to 2002 and 2003. However, harvest time prices of potatoes and sorghum had come down significantly in December from the prices in November. The Rwandan economy grew 6 percent in 2004 primarily due to a strong performance of the agriculture sector. However, according to the preliminary results of the currently ongoing joint FAO/WFP/UNICEF/Government assessment, a total of 30 000 tonnes of food aid would be required in 2005. The influx of refugees from DRC and Burundi in recent weeks has continued; the number currently stands at about 50 000. This is expected to have negative food security implications for Rwanda.

UPDATE ON FOOD AID PLEDGES AND DELIVERIES

Estimated cereal import requirements in sub-Saharan Africa in 2005 remain high and are expected to be higher than in 2004. GIEWS' latest estimates of 2004 production and 2004/05 import and food aid requirements are summarized in Tables 1 and 2. Total food aid requirement is estimated at 3 million tonnes, against about 3.1 million tonnes received in 2003/04. Cereal food aid pledges for 2004/05, including those carried over from 2003/04, amount to 1.4 million tonnes of which 0.8 million tonnes have so far been delivered.

Table 1. Cereal import and food aid requirements by subregion:

2004/05 or 2005 (in '000 tonnes)

Subregion	2004 Cereal production 1/		2004/05 or 2005		
	Total	As % of average of previous 5 years	Cereal import requirements 2/	Anticipated commercial imports	Food aid requirements
Eastern Africa	24 994	107	5 594	4 136	1 458
Southern Africa	21 342	101	7 423	6 487	936
Western Africa	39 454	106	9 415	8 890	526
Central Africa	3 197	104	1 500	1 442	58
TOTAL	88 987	105	23 932	20 955	2 978

Note: totals computed from unrounded data

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 2. Cereal import and food aid requirements for sub-Saharan Africa
in 2004/05 or 2005 (in '000 tonnes)

Subregion/ country	Marketing year	2004 Cereal production 1/		2003/04 or 2004 imports			Position for 2004/05 or 2005		
		Total	As % of average of previous 5 years	Total imports 2/	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment
Eastern Africa		24 994	109	5 070	98	1 452	5 594	4 136	1 458
Burundi	Jan./Dec.	280	113	96	125	56	82	50	32
Comoros	Jan./Dec.	6	100	33	94	-	33	33	-
Djibouti	Jan./Dec.	-	-	82	122	5	63	55	8
Eritrea	Jan./Dec.	85	37	384	117	248	422	80	342
Ethiopia	Jan./Dec.	11 700	135	582	53	544	230	45	185
Kenya	Oct./Sept.	2 490	85	1 259	99	66	2 000	1 550	450
Rwanda	Jan./Dec.	266	105	224	102	27	229	199	30
Seychelles	Jan./Dec.	-	-	13	100	-	13	13	-
Somalia	Aug./July	264	92	267	122	21	304	242	62
Sudan	Nov./Oct.	3 391	78	1 290	117	222	1 326	1 187	139
Tanzania, U.R.	June/May	4 569	119	618	112	134	632	552	80
Uganda	Jan./Dec.	1 943	94	222	138	129	260	130	130
Southern Africa		21 342	101	6 872	1 466	1 109	7 423	6 487	936
Angola	April/March	717	127	837	139	219	820	642	178
Botswana	April/March	19	100	312	114	-	315	315	-
Lesotho	April/March	49	32	241	104	19	352	303	49
Madagascar	April/March	2 240	114	368	122	39	375	290	85
Malawi	April/March	1 813	84	101	45	14	413	357	56
Mauritius	Jan./Dec.	1	100	291	105	-	290	290	-
Mozambique	April/March	1 943	117	823	165	276	785	655	130
Namibia	May/April	131	133	192	123	12	150	135	15
South Africa	May/April	12 021	103	2 394	127	75	2 431	2 431	-
Swaziland	May/April	65	68	132	160	16	132	100	32
Zambia	May/April	1 368	123	297	96	65	70	55	15
Zimbabwe	April/March	975	60	884	167	374	1 290	914	376
Western Africa		39 454	106	9 336	209	402	9 415	8 890	526
Coastal countries		27 995	106	6 970	112	199	6 702	6 421	282
Benin	Jan./Dec.	1 579	160	168	136	13	143	135	8
Côte d'Ivoire	Jan./Dec.	1 214	91	1 135	90	24	1 155	1 108	47
Ghana	Jan./Dec.	1 858	106	763	143	54	751	680	71
Guinea	Jan./Dec.	812	105	361	92	9	370	335	35
Liberia	Jan./Dec.	104	93	226	123	70	210	135	75
Nigeria	Jan./Dec.	21 366	104	3 930	116	-	3 680	3 670	11
Sierra Leone	Jan./Dec.	207	118	277	115	29	288	253	35
Togo	Jan./Dec.	855	118	110	104	-	105	105	-
Sahelian countries		11 459	104	2 366	97	203	2 713	2 469	244
Burkina Faso	Nov./Oct.	3 030	104	172	66	24	243	217	26
Cape Verde	Nov./Oct.	4	20	72	86	34	101	42	59
Chad	Nov./Oct.	1 011	83	123	141	43	109	81	28
Gambia	Nov./Oct.	225	136	151	105	4	141	140	1
Guinea-Bissau	Nov./Oct.	165	136	56	86	10	51	45	6
Mali	Nov./Oct.	2 717	109	224	129	1	265	259	6
Mauritania	Nov./Oct.	83	63	279	88	53	347	262	85
Niger	Nov./Oct.	3 112	104	357	86	21	504	478	26
Senegal	Nov./Oct.	1 113	114	932	104	13	952	945	7
Central Africa		3 197	104	1 493	155	94	1 500	1 442	58
Cameroon	Jan./Dec.	1 509	111	542	158	30	510	510	-
Cent.Afr.Rep.	Jan./Dec.	193	112	44	109	3	47	45	2
Congo, Dem. Rep of	Jan./Dec.	1 454	98	429	152	55	480	430	50
Congo, Rep. of	Jan./Dec.	8	111	281	152	3	268	265	3
Equat.Guinea	Jan./Dec.	-	-	18	113	-	16	16	-
Gabon	Jan./Dec.	31	97	166	192	-	167	167	-
Sao Tome and Principe	Jan./Dec.	2	100	13	120	3	12	9	3
TOTAL		88 987	105	22 771	113	3 057	23 932	20 955	2 978

Note: totals computed from unrounded data

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

Table 3. Triangular transactions within sub-Saharan Africa in 2004/05 or 2005

(in '000 tonnes) 1/

Donor	Source of supply	Recipient country	Total by donor
EC	Zambia	Zimbabwe (1.9)	1.9
WFP	Ethiopia South Africa	Madagascar (2.7) Angola (7.5), Lesotho (1.9), Madagascar (0.9), Mali (1.4), Sao Tomé and Príncipe (0.3), Sudan (1.4), Swaziland (0.8), Tanzania (2.4), Zimbabwe (14.0)	56.3
	Zambia	Zimbabwe (23.0)	
TOTAL			58.2

1/ Based on information reported by WFP to GIEWS as of mid-March 2005.

Table 4. Local purchases within sub-Saharan Africa in 2004/05 or 2005

(in '000 tonnes) 1/

Donor	Recipient country	Total by donor
Canada	Niger (0.1)	0.1
EC	Burundi (0.4), Congo, Dem.Rep.of (2.2), Madagascar (2.9), Sudan (5.0), Zambia (5.6)	16.1
Germany	Lesotho (0.4), Tanzania (0.4), Zambia (1.5), Zimbabwe (3.2)	5.5
NGOs	Malawi (0.1), Tanzania, U.R. (0.4)	0.5
WFP	Benin (0.1), Burkina Faso (4.7), Cent.Afr.Rep. (0.3), Ghana (0.5), Kenya (60.4), Lesotho (32.7), Malawi (47.4), Mali (1.1), Mozambique (4.8), Namibia (4.0), Niger (1.0), Senegal (0.5), Sudan (47.1), Swaziland (3.7), Tanzania (28.5), Uganda (19.0), Zambia (23.0), Zimbabwe (8.1)	286.9
TOTAL		309.1

1/ Based on information reported by WFP to GIEWS as of mid-March 2005.

Table 5. Cereal food aid pledges and percent delivered for sub-Saharan African countries in 2004/05 or 2005 (in '000 tonnes)

Donor/recipient	EC	Japan	NGOs	U.S.A.	WFP	Food aid pledges	Percent delivered as of mid-March 1/
Eastern Africa	13.5	-	-	264.8	475.6	753.9	62
Burundi	-	-	-	-	17.3	17.3	100
Comoros	-	-	-	-	-	-	-
Djibouti	-	-	-	-	-	-	-
Eritrea	13.5	-	-	86.1	4.5	104.1	3
Ethiopia	-	-	-	63.3	27.7	91.0	26
Kenya	-	-	-	44.8	70.5	115.3	71
Rwanda	-	-	-	5.7	4.1	9.8	65
Seychelles	-	-	-	-	-	-	-
Somalia	-	-	-	17.2	23.8	41.0	82
Sudan	-	-	-	17.3	292.4	309.7	87
Tanzania, U.R.	-	-	-	-	10.5	10.5	100
Uganda	-	-	-	30.4	24.8	55.2	34
Southern Africa	14.0	-	4.4	152.9	235.4	406.7	68
Angola	1.4	-	-	31.3	36.7	69.4	67
Botswana	-	-	-	-	-	-	-
Lesotho	-	-	-	-	6.4	6.4	92
Madagascar	0.6	-	-	32.1	15.6	48.3	57
Malawi	-	-	1.9	7.5	27.0	36.4	81
Mauritius	-	-	-	-	-	-	-
Mozambique	-	-	-	62.0	20.2	82.2	25
Namibia	-	-	-	-	1.5	1.5	100
South Africa	-	-	-	-	-	-	-
Swaziland	-	-	-	-	1.1	1.1	100
Zambia	-	-	-	20.0	0.8	20.8	63
Zimbabwe	12.0	-	2.5	-	126.1	140.6	94
Western Africa	4.4	6.1	0.3	170.5	59.3	240.6	39
Coastal countries	-	-	0.3	92.1	28.2	120.6	28
Benin	-	-	-	5.1	-	5.1	-
Côte d'Ivoire	-	-	-	12.0	2.2	14.2	15
Ghana	-	-	-	51.1	-	51.1	11
Guinea	-	-	-	0.6	1.1	1.7	53
Liberia	-	-	0.3	-	22.9	23.2	99
Nigeria	-	-	-	10.5	-	10.5	-
Sierra Leone	-	-	-	12.8	2.0	14.8	14
Togo	-	-	-	-	-	-	-
Sahelian countries	4.4	6.1	-	78.4	31.1	120.0	50
Burkina Faso	-	6.1	-	17.9	0.1	24.1	56
Cape Verde	4.4	-	-	22.9	1.1	28.4	26
Chad	-	-	-	4.7	20.2	24.9	88
Gambia	-	-	-	0.1	0.9	1.0	100
Guinea-Bissau	-	-	-	-	0.9	0.9	100
Mali	-	-	-	-	1.8	1.8	100
Mauritania	-	-	-	11.0	2.2	13.2	11
Niger	-	-	-	7.4	3.9	11.3	94
Senegal	-	-	-	14.4	-	14.4	5
Central Africa	-	-	-	2.2	3.7	5.9	32
Cameroon	-	-	-	-	-	-	-
Cent.Afr.Rep.	-	-	-	-	0.4	0.4	50
Congo, Dem.Rep.of	-	-	-	-	2.4	2.4	33
Congo, Rep.of	-	-	-	2.2	0.6	2.8	21
Equat. Guinea	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-
Sao Tome and Principe	-	-	-	-	0.3	0.3	100
TOTAL	31.9	6.1	4.7	590.4	774.0	1 407.1	59

1/ Percentages calculated from unrounded data.

**PART II: CEREAL SUPPLY/DEMAND SITUATION
IN INDIVIDUAL COUNTRIES**

(Situation as of mid-March 2005)

The estimated 2004 cereal production is about 9 percent above the previous year's level reflecting both higher plantings and yields. Cereal import requirements at 820 000 tonnes are above last year as total utilization has increased. The annual per capita cereal consumption rate has increased by about 3 kg reflecting higher imports of wheat and rice in the past years and this season's improved maize production. Food aid requirements have been reduced due to improved security in the country.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	4	16	642	662
Previous five years average production (incl. paddy rice)	4	13	551	568
Previous year imports	412	157	267	837
Previous five years average imports	338	120	212	670
<u>2004/05 Domestic Availability</u>	33	24	700	757
2004 Production (incl. paddy rice)	3	21	700	724
2004 Production (incl. milled rice)	3	14	700	717
Possible stock drawdown	30	10	-	40
<u>2004/05 Utilization</u>	423	214	940	1 577
Food use	419	211	808	1 438
Non-food use	4	3	121	128
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	11	11
<u>2004/05 Import Requirement</u>	390	190	240	820
Anticipated commercial imports	390	190	62	642
of which: received or contracted	249	341	66	656
Food aid needs	-	-	178	178
<u>Current Aid Position</u>				
Food aid pledges	-	-	69	69
of which: delivered	-	-	47	47
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	27	14	53	94
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	75	158	127	127
2004/05 Import requirement compared to average	115	158	113	122
Cereal share of total calorie intake				32
<u>Additional Information</u>				
Major foodcrops	roots; tubers; maize; plantains			
Lean season	January-April			
Population (000s)	15 299			
GNI per capita in 2003 (US\$)	740			

Aggregate cereal production in 2004 has been estimated at a record 1.6 million tonnes, some 60 percent above average. Reflecting the bumper harvest, imports of cereals in the marketing year 2005 are forecast to decline to about 148 000 tonnes, mostly wheat and rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	54	989	1 043
Previous five years average production (incl. paddy rice)	-	52	952	1 004
Previous year imports	61	140	2	203 1/
Previous five years average imports	54	85	2	141
<u>2005 Domestic Availability</u>	-	47	1 532	1 579
2004 Production (incl. paddy rice)	-	78	1 532	1 610
2004 Production (incl. milled rice)	-	47	1 532	1 579
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	61	132	1 534	1 727
Food use	55	104	786	945
Non-food use	1	8	378	387
Exports or re-exports	5	-	165	170
Possible stock build up	-	20	205	225
<u>2005 Import Requirement</u>	61	85	2	148 2/
Anticipated commercial imports	60	80	-	140
of which: received or contracted	-	-	-	-
Food aid needs	1	5	2	8
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	15	113	136
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	151	161	160
2005 Import requirement compared to average	113	100	100	105
Cereal share of total calorie intake				36
<u>Additional Information</u>				
Major foodcrops	roots; tubers; maize			
Lean season	April-June			
Population (000s)	6 964			
GNI per capita in 2003 (US\$)	440			

1/ Includes 5 000 tonnes of wheat and 30 000 tonnes of rice for re-exports.

2/ Includes 5 000 tonnes of wheat for re-exports.

The estimated 2004 cereal production, mainly sorghum, is increased from the year before due to improved weather. Import requirements have remained at the same level as last year. However, the country normally covers most of its consumption requirements on commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	1	-	13	14
Previous five years average production (incl. paddy rice)	1	-	18	19
Previous year imports	87	17	208	312
Previous five years average imports	73	15	193	281
<u>2004/05 Domestic Availability</u>	1	-	18	19
2004 Production (incl. paddy rice)	1	-	18	19
2004 Production (incl. milled rice)	1	-	18	19
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	91	17	226	334
Food use	84	17	223	324
Non-food use	-	-	2	2
Exports or re-exports	7	-	-	7
Possible stock build up	-	-	1	1
<u>2004/05 Import Requirement</u>	90	17	208	315
Anticipated commercial imports	90	17	208	315
of which: received or contracted	53	-	91	144
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	48	10	128	186
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	100	-	100	100
2004/05 Import requirement compared to average	123	113	108	112
Cereal share of total calorie intake				51
<u>Additional Information</u>				
Major foodcrops	sorghum; pulses; vegetables			
Lean season	January-March			
Population (000s)	1 746			
GNI per capita in 2003 (US\$)	3 430			

BURKINA FASO

The 2004 cereal output has been provisionally estimated at 3.06 million tonnes, some 14 percent lower than the record crop harvested in 2003 but still above the average for the previous five years. Output of millet, the most important staple, which was seriously damaged by drought and desert locusts, declined by 26 percent to about 881 000 tonnes. Cereal imports in the marketing year ending in October 2005 are forecast to increase to some 243 000 tonnes. Commercial imports and pledged food aid will largely cover the rice and wheat requirements. However, the shortfall in millet will be more difficult to offset given the low availability and trade of this cereal in the subregion.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	96	3 469	3 564
Previous five years average production (incl. paddy rice)	-	95	2 857	2 952
Previous year imports	47	118	7	172
Previous five years average imports	57	180	15	252
<u>2004/05 Domestic Availability</u>	-	63	2 967	3 030
2004 Production (incl. paddy rice)	-	95	2 967	3 063
2004 Production (incl. milled rice)	-	63	2 967	3 030
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	47	249	2 977	3 274
Food use	46	239	2 442	2 727
Non-food use	1	10	475	486
Exports or re-exports	-	-	60	60
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	47	186	10	243
Anticipated commercial imports	37	180	-	217
of which: received or contracted	4	-	-	4
Food aid needs	10	6	10	26
<u>Current Aid Position</u>				
Food aid pledges	6	16	2	24
of which: delivered	4	9	1	14
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	4	19	194	216
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	100	104	104
2004/05 Import requirement compared to average	83	103	67	97
Cereal share of total calorie intake				75
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; pulses; maize			
Lean season	July-September			
Population (000s)	12 614			
GNI per capita in 2003 (US\$)	300			

The 2005 cereal production is forecast at about 286 000 tonnes. Cereal import requirements in 2005 are expected to be about 82 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	9	65	207	280
Previous five years average production (incl. paddy rice)	8	60	202	270
Previous year imports	25	5	66	96
Previous five years average imports	25	4	63	92
<u>2005 Domestic Availability</u>	10	43	211	264
2005 Production (incl. paddy rice)	10	65	211	286
2005 Production (incl. milled rice)	10	43	211	264
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	35	48	263	346
Food use	33	40	231	304
Non-food use	2	8	32	42
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	25	5	52	82
Anticipated commercial imports	25	5	20	50
of which: received or contracted	-	-	-	-
Food aid needs	-	-	32	32
<u>Current Aid Position</u>				
Food aid pledges	-	-	17	17
of which: delivered	-	-	17	17
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	4	5	30	39
	[percentage]			
<u>Indexes</u>				
2005 Production compared to average (incl. paddy rice)	125	108	104	106
2005 Import requirement compared to average	100	125	83	89
Cereal share of total calorie intake				16
<u>Additional Information</u>				
Major foodcrops	pulses; plantains; roots; tubers; maize; sorghum			
Lean season	November-December			
Population (000s)	7 832			
GNI per capita in 2003 (US\$)	100			

CAMEROON

National cereal production is estimated to have increased significantly in 2004, according to official sources. However, in the northern regions located in the Sahelian zone, dry spells and the poor distribution of rainfall as well as grain eating birds attacks during the growing season resulted in a serious decline in outputs. Vulnerable populations of the affected areas will require emergency food assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	70	1 360	1 430
Previous five years average production (incl. paddy rice)	-	65	1 317	1 382
Previous year imports	230	300	12	542
Previous five years average imports	239	253	14	506
<u>2005 Domestic Availability</u>	-	65	1 453	1 519
2004 Production (incl. paddy rice)	-	81	1 453	1 535
2004 Production (incl. milled rice)	-	55	1 453	1 509
Possible stock drawdown	-	10	-	10
<u>2005 Utilization</u>	230	325	1 473	2 029
Food use	221	310	1 163	1 694
Non-food use	4	15	276	295
Exports or re-exports	5	-	15	20
Possible stock build up	-	-	20	20
<u>2005 Import Requirement</u>	230	260	20	510
Anticipated commercial imports	230	260	20	510
of which: received or contracted	-	119	-	119
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	13	18	68	99
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	125	110	111
2005 Import requirement compared to average	96	103	143	101
Cereal share of total calorie intake				43
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	June-August			
Population (000s)	17 208			
GNI per capita in 2003 (US\$)	640			

Maize production in 2004 has been estimated at some 4 042 tonnes. Total cereal imports in the marketing year ending in October 2005 are forecast to be around 100 000 tonnes. Taking into account an anticipated commercial cereal import of 41 500 tonnes and 28 000 tonnes of food aid pledges, the total uncovered deficit for the year is about 31 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	12	12
Previous five years average production (incl. paddy rice)	-	-	20	20
Previous year imports	19	25	28	72
Previous five years average imports	19	30	30	79
<u>2004/05 Domestic Availability</u>	-	-	4	4
2004 Production (incl. paddy rice)	-	-	4	4
2004 Production (incl. milled rice)	-	-	4	4
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	22	32	51	105
Food use	22	32	50	103
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	1	-	1
<u>2004/05 Import Requirement</u>	22	32	47	101
Anticipated commercial imports	11	16	15	42
of which: received or contracted	-	-	-	-
Food aid needs	11	16	32	59
<u>Current Aid Position</u>				
Food aid pledges	4	4	20	28
of which: delivered	-	-	8	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	45	66	105	216
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	20	20
2004/05 Import requirement compared to average	113	107	157	127
Cereal share of total calorie intake				50
<u>Additional Information</u>				
Major foodcrops	maize; rice; pulses			
Lean season	n.a since 90% of requirements covered by imports			
Population (000s)	478			
GNI per capita in 2003 (US\$)	1 490			

CENTRAL AFRICAN REPUBLIC

Cereal production in 2004 has been estimated at some 203 000 tonnes, some 12 percent higher than the average for the previous five years, reflecting an improved security situation and increased plantings following agricultural inputs distribution with assistance of FAO in the localities which were adversely affected by the 2003 rebellion. Cereal import requirement in 2005 is estimated at some 47 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	30	172	202
Previous five years average production (incl. paddy rice)	-	25	156	181
Previous year imports	37	3	4	44
Previous five years average imports	40	3	3	46
<u>2005 Domestic Availability</u>	3	19	174	196
2004 Production (incl. paddy rice)	-	30	174	203
2004 Production (incl. milled rice)	-	19	174	193
Possible stock drawdown	3	-	-	3
<u>2005 Utilization</u>	43	22	177	242
Food use	43	22	155	220
Non-food use	-	-	23	23
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	40	3	4	47
Anticipated commercial imports	40	3	2	45
of which: received or contracted	-	-	-	-
Food aid needs	-	-	2	2
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	11	6	39	56
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	119	111	112
2005 Import requirement compared to average	100	100	117	101
Cereal share of total calorie intake				22
<u>Additional Information</u>				
Major foodcrops	roots; tubers; tree nuts; coarse grains; fruit			
Lean season	May-July			
Population (000s)	3 958			
GNI per capita in 2003 (US\$)	260			

Cereal production in 2004/05 was provisionally estimated at 1.038 million tonnes. At this level, production is about one third lower than 2003 good output. However, cereal imports are not expected to increase significantly compared to last year, due to possible stock drawdown, following 2003 record crop.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	3	126	1 489	1 618
Previous five years average production (incl. paddy rice)	3	121	1 135	1 259
Previous year imports	74	19	30	123
Previous five years average imports	62	15	19	96
<u>2004/05 Domestic Availability</u>	6	70	1 177	1 254
2004 Production (incl. paddy rice)	3	88	947	1 038
2004 Production (incl. milled rice)	3	60	947	1 011
Possible stock drawdown	3	10	230	243
<u>2004/05 Utilization</u>	76	90	1 197	1 363
Food use	75	81	995	1 151
Non-food use	1	9	186	195
Exports or re-exports	-	-	17	17
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	69	20	20	109
Anticipated commercial imports	55	18	8	81
of which: received or contracted	6	-	1	7
Food aid needs	14	2	12	28
<u>Current Aid Position</u>				
Food aid pledges	5	-	20	25
of which: delivered	3	-	19	22
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	9	10	119	137
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	111	72	83	82
2004/05 Import requirement compared to average	112	133	105	114
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; roots; tubers; tree nuts			
Lean season	August-September			
Population (000s)	8 383			
GNI per capita in 2003 (US\$)	250			

The country imports nearly all its cereal requirements, mostly rice, on a commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	3	4	7
Previous five years average production (incl. paddy rice)	-	3	4	7
Previous year imports	6	27	-	33
Previous five years average imports	6	26	1	33
<u>2005 Domestic Availability</u>	-	2	4	6
2004 Production (incl. paddy rice)	-	3	4	7
2004 Production (incl. milled rice)	-	2	4	6
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	6	29	4	39
Food use	6	27	2	35
Non-food use	-	2	2	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	6	27	-	33
Anticipated commercial imports	6	27	-	33
of which: received or contracted	-	2	-	2
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	34	3	44
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	100	100	100
2005 Import requirement compared to average	100	104	-	100
Cereal share of total calorie intake				44
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; bananas; coconuts			
Lean season	January-December			
Population (000s)	790			
GNI per capita in 2003 (US\$)	450			

CONGO, DEMOCRATIC REPUBLIC OF

The country's food import requirement for 2005 is estimated at 480 000 tonnes or about one-sixth of total utilisation. The food aid requirement for 2005 estimated at 50 000 tonnes, is slightly reduced from the previous years due to the improvement in the security situation.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	18	315	1 195	1 527
Previous five years average production (incl. paddy rice)	11	329	1 259	1 599
Previous year imports	250	100	79	429
Previous five years average imports	189	92	68	349
<u>2005 Domestic Availability</u>	11	210	1 233	1 454
2004 Production (incl. paddy rice)	11	315	1 233	1 559
2004 Production (incl. milled rice)	11	210	1 233	1 454
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	311	310	1 313	1 934
Food use	303	273	1 040	1 616
Non-food use	8	38	273	318
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	300	100	80	480
Anticipated commercial imports	300	100	30	430
of which: received or contracted	-	2	2	4
Food aid needs	-	-	50	50
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	2
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	5	5	19	29
	[percentage]			
2004 Production compared to average (incl. paddy rice)	100	96	98	98
2005 Import requirement compared to average	159	109	118	138
Cereal share of total calorie intake				18
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	north: October; south: November-December			
Population (000s)	56 114			
GNI per capita in 2003 (US\$)	100			

CONGO, REPUBLIC OF

The country produces on average 7 000 tonnes of cereals and imports commercially the bulk of its cereal requirement estimated at 268 000 tonnes in 2005.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	1	7	8
Previous five years average production (incl. paddy rice)	-	1	6	7
Previous year imports	213	63	5	281
Previous five years average imports	180	61	5	246
<u>2005 Domestic Availability</u>	-	1	7	8
2004 Production (incl. paddy rice)	-	1	7	8
2004 Production (incl. milled rice)	-	1	7	8
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	200	64	12	276
Food use	195	59	10	264
Non-food use	5	5	2	12
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	200	63	5	268
Anticipated commercial imports	200	60	5	265
of which: received or contracted	-	-	-	-
Food aid needs	-	3	-	3
<u>Current Aid Position</u>				
Food aid pledges	-	3	-	3
of which: delivered	-	1	-	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	59	18	3	80
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	140	117	120
2005 Import requirement compared to average	111	103	100	109
Cereal share of total calorie intake				30
<u>Additional Information</u>				
Major foodcrops	roots; tubers; fruit			
Lean season	September-November			
Population (000s)	3 281			
GNI per capita in 2003 (US\$)	640			

The results of a crop assessment organized by the Government jointly with FAO and WFP in February 2005 indicate cereal production (rice, maize, millet and sorghum) in 2004 at about 1.5 million tonnes, slightly higher than in 2003, but still 10 percent below the average for the five years preceding the crisis. The total cereal import requirement in 2005 is estimated at about 1.15 million tonnes, virtually unchanged from previous year, of which about 1.1 million tonnes would be obtained on commercial terms, leaving about 47 000 tonnes to be met through external assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	847	613	1 460
Previous five years average production (incl. paddy rice)	-	978	717	1 695
Previous year imports	300	800	35	1 135
Previous five years average imports	295	1 000	19	1 314
<u>2005 Domestic Availability</u>	-	591	673	1 264
2004 Production (incl. paddy rice)	-	902	673	1 575
2004 Production (incl. milled rice)	-	541	673	1 214
Possible stock drawdown	-	50	-	50
<u>2005 Utilization</u>	315	1 391	713	2 419
Food use	310	1 264	553	2 127
Non-food use	5	128	153	286
Exports or re-exports	-	-	5	5
Possible stock build up	-	-	2	2
<u>2005 Import Requirement</u>	315	800	40	1 155
Anticipated commercial imports	300	778	30	1 108
of which: received or contracted	-	-	-	-
Food aid needs	15	22	10	47
<u>Current Aid Position</u>				
Food aid pledges	-	14	-	14
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	18	72	31	120
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	92	94	93
2005 Import requirement compared to average	107	80	211	88
Cereal share of total calorie intake				41
<u>Additional Information</u>				
Major foodcrops	roots; tubers; fruit; rice; maize			
Lean season	April-July			
Population (000s)	17 670			
GNI per capita in 2003 (US\$)	660			

The country relies entirely on imports to meet its cereal consumption needs.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	-	-
Previous five years average production (incl. paddy rice)	-	-	-	-
Previous year imports	54	27	1	82
Previous five years average imports	45	24	3	72
<u>2005 Domestic Availability</u>	3	7	-	10
2004 Production (incl. paddy rice)	-	-	-	-
2004 Production (incl. milled rice)	-	-	-	-
Possible stock drawdown	3	7	-	10
<u>2005 Utilization</u>	43	27	3	73
Food use	43	27	2	72
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	40	20	3	63
Anticipated commercial imports	35	20	-	55
of which: received or contracted	-	-	-	-
Food aid needs	5	-	3	8
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	65	41	3	109
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	-	-
2005 Import requirement compared to average	89	83	100	88
Cereal share of total calorie intake				53
<u>Additional Information</u>				
Major foodcrops	vegetables			
Lean season	January-December			
Population (000s)	660			
GNI per capita in 2003 (US\$)	910			

EQUATORIAL GUINEA

The country does not produce a significant quantity of cereals. The staple foods are sweet potatoes, cassava and plantains. It imports on average 10 000 tonnes of wheat and 6 000 tonnes of rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	-	-
Previous five years average production (incl. paddy rice)	-	-	-	-
Previous year imports	10	8	-	18
Previous five years average imports	12	6	-	18
2005 Domestic Availability	1	-	-	1
2004 Production (incl. paddy rice)	-	-	-	-
2004 Production (incl. milled rice)	-	-	-	-
Possible stock drawdown	1	-	-	1
2005 Utilization	11	6	-	17
Food use	11	6	-	17
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
2005 Import Requirement	10	6	-	16
Anticipated commercial imports	10	6	-	16
of which: received or contracted	-	3	-	3
Food aid needs	-	-	-	-
Current Aid Position				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	22	12	-	33
	[percentage]			
2004 Production compared to average (incl. paddy rice)	-	-	-	-
2005 Import requirement compared to average	83	100	-	89
Cereal share of total calorie intake				15
Additional Information				
Major foodcrops	cassava; sweet potatoes; plantains			
Lean season	September-November			
Population (000s)	512			
GNI per capita in 2003 (US\$)	n.a.			

Domestic cereal availability in the 2005 marketing year (January/December) is estimated at 145 000 tonnes against total utilization requirements of 567 000 tonnes. Cereal import requirement is thus estimated at 422 000 tonnes. With commercial imports estimated at 80 000 tonnes, food aid needs are estimated at 342 000 tonnes. As of mid-March, the amount of food aid pledged stood at 104 000 tonnes of which 3 000 have been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	3	-	102	105
Previous five years average production (incl. paddy rice)	15	-	152	167
Previous year imports	311	11	63	384
Previous five years average imports	295	9	54	358
<u>2005 Domestic Availability</u>	65	-	80	145
2004 Production (incl. paddy rice)	5	-	80	85
2004 Production (incl. milled rice)	5	-	80	85
Possible stock drawdown	60	-	-	60
<u>2005 Utilization</u>	315	11	241	567
Food use	315	11	187	513
Non-food use	-	-	33	33
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	21	21
<u>2005 Import Requirement</u>	250	11	161	422
Anticipated commercial imports	30	11	39	80
of which: received or contracted	-	-	-	-
Food aid needs	220	-	122	342
<u>Current Aid Position</u>				
Food aid pledges	51	-	53	104
of which: delivered	2	-	1	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	87	3	52	142
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	33	-	53	51
2005 Import requirement compared to average	85	122	298	118
Cereal share of total calorie intake				79
<u>Additional Information</u>				
Major foodcrops	sorghum; teff; millet; maize; pulses			
Lean season	August-November			
Population (000s)	3 622			
GNI per capita in 2003 (US\$)	190			

In the 2005 marketing year (January/December) domestic cereal availability is estimated at 11.70 million tonnes against total utilization requirements of about 11.93 million tonnes. Total cereal import requirement is thus estimated at 230 000 tonnes. With commercial imports anticipated at 45 000 tonnes, food aid needs amount to 185 000 tonnes. As of mid-March, food aid pledges stood at 91 000 tonnes of which 24 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	1 727	-	7 903	9 630
Previous five years average production (incl. paddy rice)	1 440	-	7 213	8 653
Previous year imports	481	16	86	582
Previous five years average imports	971	14	85	1 070
2005 Domestic Availability	2 781	-	8 919	11 700
2004 Production (incl. paddy rice)	2 781	-	8 919	11 700
2004 Production (incl. milled rice)	2 781	-	8 919	11 700
Possible stock drawdown	-	-	-	-
2005 Utilization	2 981	15	8 934	11 930
Food use	2 603	15	7 243	9 861
Non-food use	278	-	1 091	1 369
Exports or re-exports	-	-	100	100
Possible stock build up	100	-	500	600
2005 Import Requirement	200	15	15	230
Anticipated commercial imports	30	15	-	45
of which: received or contracted	-	-	-	-
Food aid needs	170	-	15	185
Current Aid Position				
Food aid pledges	74	1	16	91
of which: delivered	14	-	10	24
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	36	-	99	135
Indexes	[percentage]			
2004 Production compared to average (incl. paddy rice)	193	-	124	135
2005 Import requirement compared to average	21	107	18	21
Cereal share of total calorie intake				79
Additional Information				
Major foodcrops	sorghum; teff; millet; maize; pulses			
Lean season	August-November			
Population (000s)	73 044			
GNI per capita in 2003 (US\$)	90			

The main foodcrops are cassava and plantains. The only cereal crop grown is maize. In a normal year production reaches about 30 000 tonnes. Imports of cereals in 2005, mainly wheat and rice, are estimated at some 167 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	31	31
Previous five years average production (incl. paddy rice)	-	-	29	29
Previous year imports	73	90	3	166
Previous five years average imports	65	70	3	138
<u>2005 Domestic Availability</u>	-	-	33	33
2004 Production (incl. paddy rice)	-	-	31	31
2004 Production (incl. milled rice)	-	-	31	31
Possible stock drawdown	-	-	2	2
<u>2005 Utilization</u>	74	90	36	200
Food use	73	55	28	156
Non-food use	1	35	8	44
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	74	90	3	167
Anticipated commercial imports	74	90	3	167
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	54	41	20	115
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	107	107
2005 Import requirement compared to average	114	129	100	121
Cereal share of total calorie intake				26
<u>Additional Information</u>				
Major foodcrops	roots; tubers			
Lean season	September-November			
Population (000s)	1 359			
GNI per capita in 2003 (US\$)	3 580			

GAMBIA, REPUBLIC OF

Cereal production in 2004 was provisionally estimated at a record 239 000 tonnes, an increase of about 12 percent over last year's good crop and significantly above the average for the previous five years. Cereal import requirements for 2004/05 are forecast at about 141 000 tonnes, to be mainly covered on commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	30	184	213
Previous five years average production (incl. paddy rice)	-	29	146	175
Previous year imports	55	96	-	151
Previous five years average imports	48	99	1	148
<u>2004/05 Domestic Availability</u>	5	26	198	230
2004 Production (incl. paddy rice)	-	40	198	239
2004 Production (incl. milled rice)	-	26	198	225
Possible stock drawdown	5	-	-	5
<u>2004/05 Utilization</u>	45	127	199	371
Food use	32	93	137	262
Non-food use	1	4	39	44
Exports or re-exports	12	30	20	62
Possible stock build up	-	-	2	2
<u>2004/05 Import Requirement</u>	40	101	-	141
Anticipated commercial imports	40	100	-	140
of which: received or contracted	3	-	-	3
Food aid needs	-	1	-	1
<u>Current Aid Position</u>				
Food aid pledges	-	1	-	1
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	21	62	91	175
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	139	136	136
2004/05 Import requirement compared to average	83	102	25	95
Cereal share of total calorie intake				55
<u>Additional Information</u>				
Major foodcrops	rice; millet; sorghum			
Lean season	July-September			
Population (000s)	1 502			
GNI per capita in 2003 (US\$)	310			

The aggregate output of cereals in 2004 is provisionally estimated at 1 930 000 tonnes, which is slightly below 2003 and close to the five-year average. The cereal import requirement for 2005, mainly wheat and rice, is forecast at 751 000 tonnes of which about 680 000 tonnes are anticipated to be covered by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	239	1 802	2 041
Previous five years average production (incl. paddy rice)	-	250	1 608	1 858
Previous year imports	270	476	17	763
Previous five years average imports	267	287	33	587
<u>2005 Domestic Availability</u>	-	144	1 734	1 878
2004 Production (incl. paddy rice)	-	216	1 714	1 930
2004 Production (incl. milled rice)	-	144	1 714	1 858
Possible stock drawdown	-	-	20	20
<u>2005 Utilization</u>	266	599	1 764	2 629
Food use	263	398	1 326	1 988
Non-food use	3	26	363	392
Exports or re-exports	-	175	75	250
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	266	455	30	751
Anticipated commercial imports	210	450	20	680
of which: received or contracted	-	8	-	8
Food aid needs	56	5	10	71
<u>Current Aid Position</u>				
Food aid pledges	39	-	12	51
of which: delivered	2	-	4	6
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	13	19	63	95
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	86	107	104
2005 Import requirement compared to average	100	159	91	128
Cereal share of total calorie intake				28
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; rice			
Lean season	April-June			
Population (000s)	20 953			
GNI per capita in 2003 (US\$)	320			

Output from the 2004 cereal harvest, mostly rice, has been estimated at an average level of about 1 million tonnes, similar to previous year's crop. Cereal import requirements for marketing year 2005 are estimated at 370 000 tonnes. Commercial imports are projected at 335 000 tonnes, leaving a food aid requirement of 35 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	843	246	1 088
Previous five years average production (incl. paddy rice)	-	830	235	1 065
Previous year imports	118	240	3	361
Previous five years average imports	125	267	6	398
2005 Domestic Availability	-	567	255	822
2004 Production (incl. paddy rice)	-	850	245	1 095
2004 Production (incl. milled rice)	-	567	245	812
Possible stock drawdown	-	-	10	10
2005 Utilization	120	817	255	1 192
Food use	117	685	212	1 014
Non-food use	3	112	43	158
Exports or re-exports	-	20	-	20
Possible stock build up	-	-	-	-
2005 Import Requirement	120	250	-	370
Anticipated commercial imports	100	235	-	335
of which: received or contracted	-	-	-	-
Food aid needs	20	15	-	35
Current Aid Position				
Food aid pledges	-	-	2	2
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	15	88	27	130
	[percentage]			
Indexes				
2004 Production compared to average (incl. paddy rice)	-	102	104	103
2005 Import requirement compared to average	96	94	-	93
Cereal share of total calorie intake				44
Additional Information				
Major foodcrops	rice; roots; tubers; coarse grains			
Lean season	July-September			
Population (000s)	7 790			
GNI per capita in 2003 (US\$)	430			

GUINEA-BISSAU

The 2004 aggregate cereal production has been estimated at some 208 000 tonnes, 72 percent above last year's level. Rice, the main crop, is expected to increase by 92 percent to 127 000 tonnes. Consequently, per caput cereal consumption is forecast to recover significantly from its previous low level.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	66	55	121
Previous five years average production (incl. paddy rice)	-	86	63	149
Previous year imports	15	38	3	56
Previous five years average imports	14	47	1	62
<u>2004/05 Domestic Availability</u>	-	84	81	165
2004 Production (incl. paddy rice)	-	127	81	208
2004 Production (incl. milled rice)	-	84	81	165
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	16	119	81	217
Food use	16	93	62	172
Non-food use	-	13	13	26
Exports or re-exports	-	5	-	5
Possible stock build up	-	8	6	14
<u>2004/05 Import Requirement</u>	16	35	-	51
Anticipated commercial imports	15	30	-	45
of which: received or contracted	2	10	-	12
Food aid needs	1	5	-	6
<u>Current Aid Position</u>				
Food aid pledges	-	1	-	1
of which: delivered	-	1	-	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	13	73	49	135
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	147	129	139
2004/05 Import requirement compared to average	116	74	-	83
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	rice; coarse grains; oils; fats; roots; tubers			
Lean season	May-August			
Population (000s)	1 278			
GNI per capita in 2003 (US\$)	140			

KENYA

Domestic cereal availability in 2004/05 (October/September) is estimated at 2.49 million tonnes against total utilization requirements of 4.49 million tonnes. Thus, total cereal import requirement is estimated at 2 million tonnes, of which commercial imports are estimated at 1.55 million tonnes, leaving a food aid requirement of 450 000 tonnes. As of mid-March, food aid pledges amounted to 115 000 tonnes of which 82 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (October/September)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	196	50	2 816	3 062
Previous five years average production (incl. paddy rice)	232	50	2 660	2 942
Previous year imports	430	210	619	1 259
Previous five years average imports	546	158	656	1 360
2004/05 Domestic Availability	197	29	2 264	2 490
2004 Production (incl. paddy rice)	197	45	2 264	2 506
2004 Production (incl. milled rice)	197	29	2 264	2 490
Possible stock drawdown	-	-	-	-
2004/05 Utilization	797	229	3 464	4 490
Food use	767	201	3 140	4 108
Non-food use	30	28	314	372
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	10	10
2004/05 Import Requirement	600	200	1 200	2 000
Anticipated commercial imports	500	200	850	1 550
of which: received or contracted	175	45	158	378
Food aid needs	100	-	350	450
Current Aid Position				
Food aid pledges	38	4	73	115
of which: delivered	15	4	63	82
Donor-financed purchases	-	-	60	60
of which: for local use	-	-	60	60
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	24	6	97	127
	[percentage]			
2004 Production compared to average (incl. paddy rice)	85	90	85	85
2004/05 Import requirement compared to average	110	127	183	147
Cereal share of total calorie intake				50
Additional Information				
Major foodcrops	maize; wheat; pulses; roots; tubers			
Lean season	June-July			
Population (000s)	32 440			
GNI per capita in 2003 (US\$)	390			

The estimated 2004 cereal production is estimated at 49 000 tonnes, less than half of the previous year. Consequently, the country needs to import 352 000 tonnes (or 85 percent of its total requirements) of cereals to cover domestic consumption requirements, including 49 000 tonnes of food aid for vulnerable groups who experienced crop failure.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	37	-	82	119
Previous five years average production (incl. paddy rice)	24	-	132	156
Previous year imports	66	10	165	241
Previous five years average imports	62	9	163	234
<u>2004/05 Domestic Availability</u>	25	-	39	64
2004 Production (incl. paddy rice)	13	-	36	49
2004 Production (incl. milled rice)	13	-	36	49
Possible stock drawdown	12	-	3	15
<u>2004/05 Utilization</u>	96	3	317	416
Food use	95	3	314	413
Non-food use	1	-	2	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	71	3	278	352
Anticipated commercial imports	71	3	229	303
of which: received or contracted	58	-	111	169
Food aid needs	-	-	49	49
<u>Current Aid Position</u>				
Food aid pledges	-	-	6	6
of which: delivered	-	-	6	6
Donor-financed purchases	-	-	33	33
of which: for local use	-	-	33	33
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	1	139	182
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	54	-	28	32
2004/05 Import requirement compared to average	114	33	170	150
Cereal share of total calorie intake				78
<u>Additional Information</u>				
Major foodcrops	maize; sorghum; vegetables			
Lean season	February-April			
Population (000s)	2 264			
GNI per capita in 2003 (US\$)	590			

Paddy production in 2004/05 is estimated at 159 600 tonnes compared to 110 000 tonnes in 2003/04, reflecting the return of many displaced people following the end of the civil war. Cereal import requirements in 2005 are estimated at 210 000 tonnes, about one-third of which is anticipated to be covered by food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	110	-	110
Previous five years average production (incl. paddy rice)	-	127	-	127
Previous year imports	66	150	11	226
Previous five years average imports	60	107	38	205
<u>2005 Domestic Availability</u>	-	104	-	104
2004 Production (incl. paddy rice)	-	160	-	160
2004 Production (incl. milled rice)	-	104	-	104
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	75	224	15	314
Food use	73	200	15	288
Non-food use	2	24	-	26
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	75	120	15	210
Anticipated commercial imports	15	120	-	135
of which: received or contracted	-	1	-	1
Food aid needs	60	-	15	75
<u>Current Aid Position</u>				
Food aid pledges	21	-	2	23
of which: delivered	21	-	2	23
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	21	57	4	83
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	126	-	126
2005 Import requirement compared to average	125	112	39	102
Cereal share of total calorie intake				36
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; oils			
Lean season	July-August			
Population (000s)	3 482			
GNI per capita in 2003 (US\$)	130			

MADAGASCAR

The 2004 main paddy crop is estimated at 3.03 million tonnes, 8 percent above last year's level. The coarse grain crop, mainly produced in southern parts, is estimated to improve by 10 percent compared to last year's drought-affected crop. Cereal imports and food aid needs are forecast in the 2004/05 marketing year at 375 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	10	2 800	155	2 965
Previous five years average production (incl. paddy rice)	10	2 601	173	2 784
Previous year imports	105	240	23	368
Previous five years average imports	99	231	17	347
<u>2004/05 Domestic Availability</u>	10	2 060	170	2 240
2004 Production (incl. paddy rice)	10	3 030	170	3 210
2004 Production (incl. milled rice)	10	2 060	170	2 240
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	140	2 275	200	2 615
Food use	140	2 095	179	2 414
Non-food use	-	150	21	171
Exports or re-exports	-	-	-	-
Possible stock build up	-	30	-	30
<u>2004/05 Import Requirement</u>	130	215	30	375
Anticipated commercial imports	80	200	10	290
of which: received or contracted	29	111	1	141
Food aid needs	50	15	20	85
<u>Current Aid Position</u>				
Food aid pledges	20	20	8	48
of which: delivered	9	13	5	27
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	117	10	135
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	100	116	98	115
2004/05 Import requirement compared to average	131	93	176	108
Cereal share of total calorie intake				53
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; maize; fruit			
Lean season	February-March			
Population (000s)	17 901			
GNI per capita in 2003 (US\$)	290			

The FAO/WFP Crop and Food Supply Assessment Mission estimated the 2004 cereal production at 1.84 million tonnes, 15 percent below last year's near-normal level. Imports of cereals are estimated at 413 000 tonnes, of which maize accounts for 350 000 tonnes for 2004/05 marketing year. A significant amount of cross-border maize imports, particularly from Mozambique, are expected. Food aid of 56 000 tonnes is recommended.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	1	88	2 052	2 142
Previous five years average production (incl. paddy rice)	2	88	2 102	2 192
Previous year imports	59	4	38	101
Previous five years average imports	45	2	160	207
<u>2004/05 Domestic Availability</u>	2	43	1 768	1 813
2004 Production (incl. paddy rice)	2	67	1 768	1 837
2004 Production (incl. milled rice)	2	43	1 768	1 813
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	60	48	2 118	2 226
Food use	60	45	1 726	1 831
Non-food use	-	3	339	342
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	53	53
<u>2004/05 Import Requirement</u>	58	5	350	413
Anticipated commercial imports	58	5	294	357
of which: received or contracted	6	2	138	146
Food aid needs	-	-	56	56
<u>Current Aid Position</u>				
Food aid pledges	-	-	36	36
of which: delivered	-	-	29	29
Donor-financed purchases	-	-	48	48
of which: for local use	-	-	48	48
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	5	4	145	153
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	85	76	84	84
2004/05 Import requirement compared to average	130	250	219	200
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	maize; pulses; roots; tubers; rice			
Lean season	February-March			
Population (000s)	11 938			
GNI per capita in 2003 (US\$)	170			

Aggregate 2004 cereal production has been estimated at about 2.99 million tonnes, which is close to the average for the previous five years. Commercial imports of cereal are expected to be around 259 000 tonnes, while cereal exports are forecast at about 162 000 tonnes, mostly unregistered cross-border trade.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	6	938	2 465	3 409
Previous five years average production (incl. paddy rice)	7	812	1 941	2 760
Previous year imports	98	125	1	224
Previous five years average imports	65	112	15	192
<u>2004/05 Domestic Availability</u>	12	579	2 162	2 752
2004 Production (incl. paddy rice)	12	851	2 127	2 990
2004 Production (incl. milled rice)	12	579	2 127	2 717
Possible stock drawdown	-	-	35	35
<u>2004/05 Utilization</u>	116	735	2 167	3 017
Food use	113	550	1 773	2 436
Non-food use	1	85	334	420
Exports or re-exports	2	100	60	162
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	104	156	5	265
Anticipated commercial imports	104	150	5	259
of which: received or contracted	7	-	-	7
Food aid needs	-	6	-	6
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	2
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	10	48	155	213
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	167	105	110	108
2004/05 Import requirement compared to average	160	139	33	138
Cereal share of total calorie intake				73
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; rice; maize			
Lean season	July-September			
Population (000s)	11 425			
GNI per capita in 2003 (US\$)	290			

MAURITANIA

Aggregate 2004 cereal output has been estimated at some 101 192 tonnes, about 44 percent below last year and 36 percent below the previous five years average. Total imports of cereal in the marketing year ending in October 2005 are forecast to be around 367 000 tonnes, including re-exports of wheat. Commercial cereal imports are estimated at about 281 600 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	1	79	102	181
Previous five years average production (incl. paddy rice)	-	77	80	157
Previous year imports	289	31	9	329 ^{1/}
Previous five years average imports	297	36	13	346
<u>2004/05 Domestic Availability</u>	-	37	46	84
2004 Production (incl. paddy rice)	-	56	45	101
2004 Production (incl. milled rice)	-	37	45	83
Possible stock drawdown	-	-	1	1
<u>2004/05 Utilization</u>	284	88	78	450
Food use	224	82	69	375
Non-food use	40	6	8	53
Exports or re-exports	20	1	1	22
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	284	51	32	367 ^{2/}
Anticipated commercial imports	259	22	1	282
of which: received or contracted	96	-	-	96
Food aid needs	25	29	31	85
<u>Current Aid Position</u>				
Food aid pledges	11	-	2	13
of which: delivered	1	-	-	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	78	29	24	131
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	73	56	64
2004/05 Import requirement compared to average	96	142	243	106
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	wheat; rice; millet; sorghum			
Lean season	July-September			
Population (000s)	2 860			
GNI per capita in 2003 (US\$)	430			

^{1/} Includes 50 000 tonnes of wheat for re-exports.

^{2/} Includes 20 000 tonnes of wheat for re-exports.

The country imports commercially nearly all of its cereal consumption requirements.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	1	1
Previous five years average production (incl. paddy rice)	-	-	1	1
Previous year imports	150	57	84	291
Previous five years average imports	154	69	64	287
<u>2005 Domestic Availability</u>	-	-	1	1
2004 Production (incl. paddy rice)	-	-	1	1
2004 Production (incl. milled rice)	-	-	1	1
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	156	70	65	291
Food use	110	65	3	178
Non-food use	6	-	62	68
Exports or re-exports	40	-	-	40
Possible stock build up	-	5	-	5
<u>2005 Import Requirement</u>	156	70	64	290
Anticipated commercial imports	156	70	64	290
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	91	54	2	147
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	100	100
2005 Import requirement compared to average	101	101	100	101
Cereal share of total calorie intake				45
<u>Additional Information</u>				
Major foodcrops	vegetables			
Lean season	January-December			
Population (000s)	1 211			
GNI per capita in 2003 (US\$)	4 090			

MOZAMBIQUE

The 2004 cereal production is estimated at 2 million tonnes, some 11 percent above last year's level. Import requirements are estimated at 785 000 tonnes, mainly rice and wheat, but also maize meal for southern areas, because moving maize from the surplus areas of North to the South remains uncompetitive due to high internal transport costs. Commercial imports are estimated at 655 000 tonnes and food aid at 130 000 tonnes. Local purchases of maize will complement the regional emergency food aid requirements.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	200	1 611	1 811
Previous five years average production (incl. paddy rice)	1	175	1 537	1 713
Previous year imports	333	281	208	823
Previous five years average imports	264	230	173	667
2004/05 Domestic Availability	1	130	1 843	1 974
2004 Production (incl. paddy rice)	1	187	1 817	2 005
2004 Production (incl. milled rice)	1	125	1 817	1 943
Possible stock drawdown	-	5	26	31
2004/05 Utilization	321	455	1 983	2 759
Food use	316	425	1 401	2 142
Non-food use	-	30	412	442
Exports or re-exports	5	-	170	175
Possible stock build up	-	-	-	-
2004/05 Import Requirement	320	325	140	785
Anticipated commercial imports	270	265	120	655
of which: received or contracted	336	210	35	580
Food aid needs	50	60	20	130
Current Aid Position				
Food aid pledges	62	11	9	82
of which: delivered	-	11	9	20
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	17	22	73	112
Indexes	[percentage]			
2004 Production compared to average (incl. paddy rice)	100	107	118	117
2004/05 Import requirement compared to average	121	141	81	118
Cereal share of total calorie intake				43
Additional Information				
Major foodcrops	roots; tubers; maize			
Lean season	February-April			
Population (000s)	19 088			
GNI per capita in 2003 (US\$)	210			

Cereal production in 2004 is estimated at 131 000 tonnes, 30 percent above the improved level of 2003. Cereal import requirements are expected to be lower than last year's and to be covered mostly on a commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	10	-	91	101
Previous five years average production (incl. paddy rice)	7	-	92	99
Previous year imports	74	-	118	192
Previous five years average imports	65	-	89	154
<u>2004/05 Domestic Availability</u>	12	-	124	136
2004 Production (incl. paddy rice)	7	-	124	131
2004 Production (incl. milled rice)	7	-	124	131
Possible stock drawdown	5	-	-	5
<u>2004/05 Utilization</u>	80	-	206	286
Food use	79	-	182	261
Non-food use	1	-	10	11
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	14	14
<u>2004/05 Import Requirement</u>	68	-	82	150
Anticipated commercial imports	58	-	77	135
of which: received or contracted	10	-	30	40
Food aid needs	10	-	5	15
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	2
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	40	-	91	131
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	100	-	134	132
2004/05 Import requirement compared to average	105	-	92	97
Cereal share of total calorie intake				64
<u>Additional Information</u>				
Major foodcrops	millet; maize; sorghum; wheat			
Population (000s)	1 995			
GNI per capita in 2003 (US\$)	1 870			

The 2004 cereal production has been provisionally estimated at 3.14 million tonnes, which is 12 percent lower than last year's good crop, but close to the average for the previous five years. Cereal imports in the marketing year ending in October 2005 are forecast to increase sharply from last year to over 500 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	8	62	3 506	3 576
Previous five years average production (incl. paddy rice)	7	65	2 927	2 999
Previous year imports	37	152	167	357
Previous five years average imports	52	129	239	420
2004/05 Domestic Availability	9	51	3 062	3 122
2004 Production (incl. paddy rice)	9	78	3 052	3 139
2004 Production (incl. milled rice)	9	51	3 052	3 112
Possible stock drawdown	-	-	10	10
2004/05 Utilization	65	189	3 372	3 626
Food use	64	179	2 904	3 147
Non-food use	1	9	468	478
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
2004/05 Import Requirement	56	138	310	504
Anticipated commercial imports	43	125	310	478
of which: received or contracted	3	30	-	33
Food aid needs	13	13	-	26
Current Aid Position				
Food aid pledges	6	4	1	11
of which: delivered	6	4	1	11
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	5	15	239	259
	[percentage]			
2004 Production compared to average (incl. paddy rice)	129	120	104	105
2004/05 Import requirement compared to average	108	107	130	120
Cereal share of total calorie intake				69
Additional Information				
Major foodcrops	millet; sorghum; pulses; roots; tubers			
Lean season	July-September			
Population (000s)	12 162			
GNI per capita in 2003 (US\$)	200			

NIGERIA

Aggregate cereal production in 2004 has been estimated at about 22.8 million tonnes, similar to the previous year record crop, reflecting generally favourable growing conditions during the rainy season. Cereal imports have trended upwards in recent years, due mainly to high urban population growth and changing consumption pattern. However, following a series of policy measures including the tightening of controls against illegal rice and wheat inflows, imports of cereals are forecast to decrease to some 3.68 million tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	71	3 373	19 172	22 616
Previous five years average production (incl. paddy rice)	75	3 178	18 408	21 661
Previous year imports	2 400	1 450	80	3 930
Previous five years average imports	2 246	1 458	98	3 802
<u>2005 Domestic Availability</u>	71	2 125	19 220	21 416
2004 Production (incl. paddy rice)	71	3 542	19 170	22 783
2004 Production (incl. milled rice)	71	2 125	19 170	21 366
Possible stock drawdown	-	-	50	50
<u>2005 Utilization</u>	2 271	3 525	19 300	25 096
Food use	2 179	3 100	15 353	20 632
Non-food use	92	425	3 807	4 324
Exports or re-exports	-	-	140	140
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	2 200	1 400	80	3 680
Anticipated commercial imports	2 200	1 390	80	3 670
of which: received or contracted	258	49	-	307
Food aid needs	-	11	-	11
<u>Current Aid Position</u>				
Food aid pledges	-	11	-	11
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	17	25	123	165
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	95	111	104	105
2005 Import requirement compared to average	98	96	82	97
Cereal share of total calorie intake				46
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; rice			
Lean season	April-May			
Population (000s)	125 244			
GNI per capita in 2003 (US\$)	320			

The 2005 cereal production is forecast to increase slightly by about 2 percent over last year's. However, cereal import requirements are estimated to be about 230 000 tonnes, including 30 000 tonnes of food aid, same as last year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	6	28	232	266
Previous five years average production (incl. paddy rice)	7	21	250	278
Previous year imports	15	24	185	224
Previous five years average imports	15	23	178	216
<u>2005 Domestic Availability</u>	6	20	235	261
2005 Production (incl. paddy rice)	6	30	235	271
2005 Production (incl. milled rice)	6	20	235	261
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	21	44	425	490
Food use	21	41	343	405
Non-food use	-	3	82	85
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	15	24	190	229
Anticipated commercial imports	15	24	160	199
of which: received or contracted	-	-	3	3
Food aid needs	-	-	30	30
<u>Current Aid Position</u>				
Food aid pledges	1	-	9	10
of which: delivered	1	-	5	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	2	4	34	40
	[percentage]			
<u>Indexes</u>				
2005 Production compared to average (incl. paddy rice)	86	143	94	97
2005 Import requirement compared to average	100	104	107	106
Cereal share of total calorie intake				17
<u>Additional Information</u>				
Major foodcrops	roots; tubers; pulses; plantains; sorghum; maize			
Lean season	November-December			
Population (000s)	10 022			
GNI per capita in 2003 (US\$)	220			

SAO TOME AND PRINCIPE

The staple foodcrops are roots, plantains and tubers. Annual imports of cereals are estimated at some 12 000 tonnes. Food aid needs for 2005 are estimated at about 3 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	2	2
Previous five years average production (incl. paddy rice)	-	-	2	2
Previous year imports	6	5	2	13
Previous five years average imports	4	6	2	12
<u>2005 Domestic Availability</u>	1	-	2	3
2004 Production (incl. paddy rice)	-	-	2	2
2004 Production (incl. milled rice)	-	-	2	2
Possible stock drawdown	1	-	-	1
<u>2005 Utilization</u>	4	7	4	15
Food use	4	7	4	15
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	1	-	1
<u>2005 Import Requirement</u>	3	7	2	12
Anticipated commercial imports	3	4	2	9
of which: received or contracted	-	-	-	-
Food aid needs	-	3	-	3
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	26	40	25	90
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	100	100
2005 Import requirement compared to average	85	117	100	103
Cereal share of total calorie intake				33
<u>Additional Information</u>				
Major foodcrops	bananas; breadfruit; cocoyam			
Lean season	January-December			
Population (000s)	163			
GNI per capita in 2003 (US\$)	310			

The 2004 cereal production is estimated at some 1.185 million tonnes, including about 52 000 tonnes of off-season crop. The important millet crop is expected to decrease by 40 percent to some 379 166 tonnes, while sorghum production is 30 percent down from the previous year. Although commercial imports and pledged food aid will largely cover the rice and wheat requirements, the shortfall in millet could be more difficult to offset given the low availability and trade of this cereal in the subregion. This could result in millet being replaced by maize and rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	232	1 220	1 452
Previous five years average production (incl. paddy rice)	-	240	837	1 077
Previous year imports	252	635	45	932
Previous five years average imports	267	634	57	958
2004/05 Domestic Availability	-	218	1 005	1 223
2004 Production (incl. paddy rice)	-	240	945	1 185
2004 Production (incl. milled rice)	-	168	945	1 113
Possible stock drawdown	-	50	60	110
2004/05 Utilization	285	850	1 040	2 175
Food use	280	826	695	1 801
Non-food use	5	24	145	174
Exports or re-exports	-	-	200	200
Possible stock build up	-	-	-	-
2004/05 Import Requirement	285	632	35	952
Anticipated commercial imports	285	625	35	945
of which: received or contracted	25	240	19	284
Food aid needs	-	7	-	7
Current Aid Position				
Food aid pledges	2	12	-	14
of which: delivered	1	-	-	1
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	26	76	64	166
	[percentage]			
2004 Production compared to average (incl. paddy rice)	-	100	113	110
2004/05 Import requirement compared to average	107	100	61	99
Cereal share of total calorie intake				61
Additional Information				
Major foodcrops	millet; sorghum; rice; maize; wheat			
Lean season	August-September			
Population (000s)	10 834			
GNI per capita in 2003 (US\$)	550			

SEYCHELLES

The cultivated area of only some 6 000 hectares is used mainly for coconuts, cinnamon and tea. Other crops, of secondary importance, include fruit and vegetables. The country relies entirely on imports to meet its cereal consumption needs.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	-	-
Previous five years average production (incl. paddy rice)	-	-	-	-
Previous year imports	2	5	6	13
Previous five years average imports	2	5	6	13
<u>2005 Domestic Availability</u>	-	-	-	-
2004 Production (incl. paddy rice)	-	-	-	-
2004 Production (incl. milled rice)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	2	5	6	13
Food use	2	5	1	8
Non-food use	-	-	5	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	2	5	6	13
Anticipated commercial imports	2	5	6	13
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	24	59	12	94
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	-	-
2005 Import requirement compared to average	100	100	100	100
Cereal share of total calorie intake				34
<u>Additional Information</u>				
Major foodcrops	coconuts; fruit; vegetables			
Lean season	January-December			
Population (000s)	85			
GNI per capita in 2003 (US\$)	7 480			

Cereal production in 2004 has been estimated at about 315 000 tonnes, some 15 000 tonnes more than in 2003. Cereal imports in 2005, mostly rice, are forecast at some 288 000 tonnes, compared to 277 000 tonnes imported last year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	250	50	300
Previous five years average production (incl. paddy rice)	-	235	36	271
Previous year imports	70	200	7	277
Previous five years average imports	67	186	10	263
<u>2005 Domestic Availability</u>	-	162	45	207
2004 Production (incl. paddy rice)	-	270	45	315
2004 Production (incl. milled rice)	-	162	45	207
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	80	362	53	495
Food use	80	322	44	445
Non-food use	-	41	9	50
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	80	200	8	288
Anticipated commercial imports	50	198	5	253
of which: received or contracted	1	-	-	1
Food aid needs	30	2	3	35
<u>Current Aid Position</u>				
Food aid pledges	8	7	-	15
of which: delivered	2	-	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	14	58	8	80
	[percentage]			
2004 Production compared to average (incl. paddy rice)	-	115	125	116
2005 Import requirement compared to average	119	108	80	110
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers			
Lean season	July-August			
Population (000s)	5 540			
GNI per capita in 2003 (US\$)	150			

SOMALIA

The total cereal import requirement in 2004/05 marketing year (August/July) is estimated at 304 000 tonnes. Commercial imports are estimated at 242 000 tonnes, leaving a food aid requirement of 62 000 tonnes. As of mid-March food aid pledges amounted to 41 000 tonnes, of which 34 000 tonnes have been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (August/July)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	2	271	273
Previous five years average production (incl. paddy rice)	-	2	285	287
Previous year imports	110	72	85	267
Previous five years average imports	108	70	77	255
<u>2004/05 Domestic Availability</u>	-	1	276	277
2004 Production (incl. paddy rice)	-	2	263	265
2004 Production (incl. milled rice)	-	1	263	264
Possible stock drawdown	-	-	13	13
<u>2004/05 Utilization</u>	120	75	386	581
Food use	120	69	357	546
Non-food use	-	6	29	35
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	120	74	110	304
Anticipated commercial imports	110	74	58	242
of which: received or contracted	-	35	-	35
Food aid needs	10	-	52	62
<u>Current Aid Position</u>				
Food aid pledges	-	6	35	41
of which: delivered	-	6	28	34
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	18	10	52	80
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	100	92	92
2004/05 Import requirement compared to average	111	106	143	119
Cereal share of total calorie intake				34
<u>Additional Information</u>				
Major foodcrops	maize; sorghum; sesame			
Lean season	June-August			
Population (000s)	6 823			
GNI per capita in 2003 (US\$)	n.a.			

SOUTH AFRICA

The final official estimate of the main maize crop in 2004 has been revised upwards to 9.7 million tonnes, and those of sorghum to 373 000 tonnes. In aggregate, the coarse grain crop is slightly above average. Consequently, export availability of maize is reduced.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	1 540	3	10 179	11 722
Previous five years average production	2 086	3	9 573	11 662
Previous year imports	1 042	780	572	2 394
Previous five years average imports	713	590	735	2 038
<u>2004/05 Domestic Availability</u>	1 945	2	10 320	12 267
2004 Production (rice in paddy terms)	1 699	3	10 320	12 022
2004 Production (rice in milled terms)	1 699	2	10 320	12 021
Possible stock drawdown	246	-	-	246
<u>2004/05 Utilization</u>	2 895	752	11 051	14 698
Food use	2 570	697	4 630	7 897
Non-food use	125	55	5 332	5 512
Exports or re-exports	200	-	930	1 130
Possible stock build up	-	-	159	159
<u>2004/05 Import Requirement</u>	950	750	731	2 431
Anticipated commercial imports	950	750	731	2 431
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	42	42
of which: for local use	-	-	-	-
for export	-	-	42	42
<u>Estimated Per Caput Consumption (kg/year)</u>	57	15	102	174
	[percentage]			
<u>Indexes</u>				
2004 production compared to average (rice paddy terms)	81	100	108	103
2004/05 Import requirement compared to average	133	127	99	119
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	Maize, wheat			
Lean season	February-April			
Population (000s)	45 295			
GNI per capita in 2003 (US\$)	2 780			

Based on an estimated domestic cereal availability of 4.49 million tonnes and total utilization requirement of about 5.81 million tonnes, the total cereal import requirement in 2004/05 (November/October) is estimated at 1.33 million tonnes, mostly wheat. With commercial imports anticipated at 1.19 million tonnes, the food aid requirement amounts to 139 000 tonnes. As of mid-March, food aid pledges stood at 310 000 tonnes of which 268 000 tonnes have been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	398	1	5 550	5 949
Previous five years average production (incl. paddy rice)	305	11	4 052	4 368
Previous year imports	1 124	30	136	1 290
Previous five years average imports	1 045	37	106	1 188
<u>2004/05 Domestic Availability</u>	467	1	4 018	4 486
2004 Production (incl. paddy rice)	467	1	2 923	3 391
2004 Production (incl. milled rice)	467	1	2 923	3 391
Possible stock drawdown	-	-	1 095	1 095
<u>2004/05 Utilization</u>	1 667	38	4 107	5 811
Food use	1 470	37	3 580	5 086
Non-food use	47	1	477	525
Exports or re-exports	-	-	50	50
Possible stock build up	150	-	-	150
<u>2004/05 Import Requirement</u>	1 200	37	89	1 326
Anticipated commercial imports	1 150	37	-	1 187
of which: received or contracted	321	9	-	330
Food aid needs	50	-	89	139
<u>Current Aid Position</u>				
Food aid pledges	199	-	111	310
of which: delivered	174	-	94	268
Donor-financed purchases	-	-	52	52
of which: for local use	-	-	52	52
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	43	1	104	148
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	153	9	72	78
2004/05 Import requirement compared to average	115	100	83	112
Cereal share of total calorie intake				56
<u>Additional Information</u>				
Major foodcrops	sorghum; millet; wheat; roots; tubers; oils			
Lean season	September-October			
Population (000s)	34 360			
GNI per capita in 2003 (US\$)	460			

The FAO estimated 2004 cereal production of 65 000 tonnes is 12 percent below last year's crop but about 30 percent below the average level. Domestic production normally meets little more than one third of the country's total cereal requirements. Cereal import requirements for 2004/05 marketing year have increased to 132 000 tonnes, including 32 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	-	74	74
Previous five years average production (incl. paddy rice)	-	-	95	95
Previous year imports	46	17	69	132
Previous five years average imports	42	10	41	93
<u>2004/05 Domestic Availability</u>	6	-	65	71
2004 Production (incl. paddy rice)	-	-	65	65
2004 Production (incl. milled rice)	-	-	65	65
Possible stock drawdown	6	-	-	6
<u>2004/05 Utilization</u>	47	7	150	203
Food use	47	7	143	196
Non-food use	-	-	4	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	3	3
<u>2004/05 Import Requirement</u>	41	7	84	132
Anticipated commercial imports	41	7	52	100
of which: received or contracted	27	-	29	56
Food aid needs	-	-	32	32
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	7	128	176
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	-	69	69
2004/05 Import requirement compared to average	96	71	206	142
Cereal share of total calorie intake				44
<u>Additional Information</u>				
Major foodcrops	maize			
Lean season	February-April			
Population (000s)	1 117			
GNI per capita in 2003 (US\$)	1 350			

TANZANIA, UNITED REPUBLIC OF

Domestic cereal availability in 2004/05 marketing year (June/May) is estimated at 4.57 million tonnes against total utilization of 5.20 million tonnes. The cereal import requirement is thus estimated at 632 000 tonnes. With commercial imports estimated at 552 000 tonnes, the food aid requirement is 80 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (June/May)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	71	650	3 334	4 055
Previous five years average production (incl. paddy rice)	71	756	3 286	4 113
Previous year imports	200	154	264	618
Previous five years average imports	276	139	115	530
<u>2004/05 Domestic Availability</u>	85	488	3 997	4 569
2004 Production (incl. paddy rice)	85	750	3 997	4 832
2004 Production (incl. milled rice)	85	488	3 997	4 569
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	385	620	4 197	5 201
Food use	276	545	3 547	4 368
Non-food use	9	60	450	519
Exports or re-exports	50	5	170	225
Possible stock build up	50	10	30	90
<u>2004/05 Import Requirement</u>	300	132	200	632
Anticipated commercial imports	300	132	120	552
of which: received or contracted	252	27	37	315
Food aid needs	-	-	80	80
<u>Current Aid Position</u>				
Food aid pledges	-	-	11	11
of which: delivered	-	-	11	11
Donor-financed purchases	-	-	29	29
of which: for local use	-	-	29	29
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	7	14	94	116
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	120	99	122	117
2004/05 Import requirement compared to average	109	95	174	119
Cereal share of total calorie intake				51
<u>Additional Information</u>				
Major foodcrops	maize; roots; tubers; sorghum; pulses; plantains; rice			
Lean season	February-April			
Population (000s)	37 691			
GNI per capita in 2003 (US\$)	290			

Aggregate cereal production in 2004 has been estimated at a record 879 700 tonnes, some 18 percent above average. As a consequence, imports of cereals in the marketing year 2005 are forecast to decline to about 165 000 tonnes, including re-exports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	62	753	815
Previous five years average production (incl. paddy rice)	-	70	677	747
Previous year imports	80	90	-	170 ^{1/}
Previous five years average imports	73	88	-	161
<u>2005 Domestic Availability</u>	-	53	802	855
2004 Production (incl. paddy rice)	-	78	802	880
2004 Production (incl. milled rice)	-	53	802	855
Possible stock drawdown	-	-	-	-
<u>2005 Utilization</u>	80	138	802	1 020
Food use	58	71	488	617
Non-food use	2	7	259	268
Exports or re-exports	20	60	25	105
Possible stock build up	-	-	30	30
<u>2005 Import Requirement</u>	80	85	-	165 ^{1/}
Anticipated commercial imports	80	85	-	165
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	11	14	93	117
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	111	118	118
2005 Import requirement compared to average	110	97	-	102
Cereal share of total calorie intake				47
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	April-July			
Population (000s)	5 261			
GNI per capita in 2003 (US\$)	310			

^{1/} Includes 60 000 tonnes of rice for re-export.

UGANDA

Domestic cereal availability in the 2005 marketing year (January/December) is estimated at 2.09 million tonnes against total utilization requirement of about 2.35 million tonnes. The cereal import requirement is thus estimated at 260 000 tonnes. With commercial imports anticipated at 130 000 tonnes, there is a food aid requirement of 130 000 tonnes. As of mid-March, food aid pledges amounted to 55 000 tonnes, of which 19 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2005 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	12	115	1 825	1 952
Previous five years average production (incl. paddy rice)	12	111	1 978	2 101
Previous year imports	50	50	122	222
Previous five years average imports	54	43	73	170
<u>2005 Domestic Availability</u>	22	73	1 998	2 093
2004 Production (incl. paddy rice)	12	110	1 858	1 980
2004 Production (incl. milled rice)	12	73	1 858	1 943
Possible stock drawdown	10	-	140	150
<u>2005 Utilization</u>	112	123	2 118	2 353
Food use	111	123	1 748	1 982
Non-food use	1	-	220	221
Exports or re-exports	-	1	150	151
Possible stock build up	-	-	-	-
<u>2005 Import Requirement</u>	90	50	120	260
Anticipated commercial imports	70	50	10	130
of which: received or contracted	-	-	-	-
Food aid needs	20	-	110	130
<u>Current Aid Position</u>				
Food aid pledges	21	3	31	55
of which: delivered	-	3	16	19
Donor-financed purchases	-	-	19	19
of which: for local use	-	-	19	19
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	4	5	66	74
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	100	99	94	94
2005 Import requirement compared to average	167	116	164	153
Cereal share of total calorie intake				21
<u>Additional Information</u>				
Major foodcrops	roots; tubers; plantains; pulses; maize; millet; sorghum			
Lean season	April-May			
Population (000s)	26 677			
GNI per capita in 2003 (US\$)	240			

Zambia's total cereal production in 2004 has been estimated at 1.37 million tonnes. This is about the same as last year but 23 percent above the average of the last five years. As a result, the country is expected to have exportable surplus of 150 000 tonnes of maize in the 2004/05 marketing year. Cereal import requirements are limited to reduced quantities of wheat and rice in which the country has a structural deficit and are met through commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	136	11	1 216	1 363
Previous five years average production (incl. paddy rice)	93	13	1 013	1 119
Previous year imports	43	23	231	297
Previous five years average imports	45	23	226	294
2004/05 Domestic Availability	93	8	1 373	1 474
2004 Production (rice in paddy terms)	83	12	1 277	1 372
2004 Production (rice in milled terms)	83	8	1 277	1 368
Possible stock drawdown	10	-	96	106
2004/05 Utilization	141	30	1 373	1 544
Food use	137	29	1 006	1 172
Non-food use	4	-	217	221
Exports or re-exports	-	-	150	150
Possible stock build up	-	1	-	1
2004/05 Import Requirement	48	22	-	70
Anticipated commercial imports	33	22	-	55
of which: received or contracted	33	22	3	58
Food aid needs	15	-	-	15
Current Aid Position				
Food aid pledges	20	-	-	20
of which: delivered	13	-	-	13
Donor-financed purchases	-	-	41	41
of which: for local use	-	-	30	30
for export	-	-	11	11
Estimated Per Caput Consumption (kg/year)	13	3	93	108
	[percentage]			
Indexes				
2004 production compared to average (incl. paddy rice)	89	90	126	123
2004/05 Import requirement compared to average	107	96	-	24
Cereal share of total calorie intake				65
Additional Information				
Major foodcrops	maize; roots; tubers			
Lean season	March-May			
Population (000s)	10 832			
GNI per capita in 2003 (US\$)	380			

ZIMBABWE

An FAO/WFP Crop and Food Supply Assessment Mission in April estimated the 2004 cereal production at 976 000 tonnes, including forecast for the winter wheat and barley crops. At this level, production is 3.5 percent below last year and well below average. Consequently, cereal import requirement for 2004/05 are increased to 1.29 million tonnes, of which maize accounts for 77 percent. Given the current tight foreign exchange position, only about 910 000 tonnes are anticipated to be imported commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	90	5	917	1 011
Previous five years average production (incl. paddy rice)	230	1	1 396	1 627
Previous year imports	33	9	842	884
Previous five years average imports	109	18	496	623
<u>2004/05 Domestic Availability</u>	80	2	893	975
2004 Production (incl. paddy rice)	80	3	893	976
2004 Production (incl. milled rice)	80	2	893	975
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	356	11	1 898	2 265
Food use	345	11	1 584	1 940
Non-food use	11	-	269	280
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	45	45
<u>2004/05 Import Requirement</u>	276	9	1 005	1 290
Anticipated commercial imports	276	9	629	914
of which: received or contracted	133	18	162	313
Food aid needs	-	-	376	376
<u>Current Aid Position</u>				
Food aid pledges	-	-	141	141
of which: delivered	-	-	132	132
Donor-financed purchases	-	-	11	11
of which: for local use	-	-	11	11
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	29	1	133	163
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	35	300	64	60
2004/05 Import requirement compared to average	253	50	203	207
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	maize; wheat; millet; sorghum			
Lean season	February-April			
Population (000s)	11 900			
GNI per capita in 2003 (US\$)	n.a.			

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"Utilization": All elements of utilisation for wheat and coarse grains are expressed in grain equivalent. For rice, all elements are expressed in milled form. Non-food use includes post-harvest losses, seed use, feed use, industrial use for all cereals.

"Countries Facing Food Emergencies": Refer to an exceptional shortfall in aggregate supplies or a localised deficit as a result of crop failures, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, other supply bottlenecks and/or an increased demand for food arising from population movements within the country or an influx of refugees. In the case of an exceptional shortfall in aggregate food supplies, emergency food aid may be required to cover all or part of the deficit.

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