



Crop Prospects and Food Situation

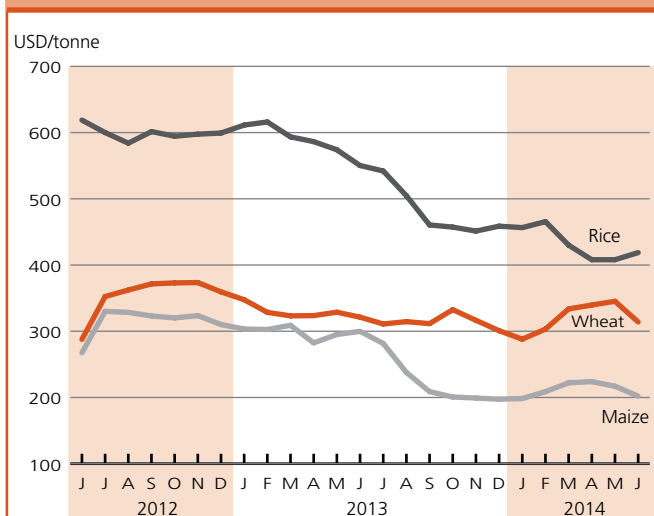
HIGHLIGHTS

- **Prospects for 2014 global cereal production improve further with upward revisions to coarse grains and wheat forecasts**, contributing to an enhanced cereal supply outlook for 2014/15.
- **International prices of wheat and maize dropped in June, reflecting favourable production prospects, while rice export quotations increased slightly.** Cereal export prices were overall lower than their year earlier levels.
- **In North Africa, an average cereal crop is forecast**, with larger harvests expected in Algeria and Tunisia, while a decline is anticipated in Morocco.
- **In the Central African Republic (CAR), continued civil insecurity has jeopardized crop production** and the food situation of a large number of people is expected to deteriorate further.
- **In Eastern Africa, continued and escalating conflicts in parts of South Sudan, the Sudan and Somalia**, further exacerbated the food insecurity situation of vulnerable groups. Drier-than-normal weather conditions are also raising concerns for crop and livestock conditions.
- **In Western Africa, in spite of adequate cereal supplies at the regional level following last year's above average harvests, humanitarian assistance is still needed in several parts**, due mostly to conflict related population displacements.
- **In Southern Africa, cereal production is expected to recover significantly in 2014 compared to the drought-reduced crop of last year.** Food prices have started to decline thus improving food access.
- **In the Far East Asia, early prospects for the main season's rice and coarse grains crops, currently being planted, are favourable.** However, a considerable decline is forecast in Sri Lanka due to dry weather.
- **In the Near East, adverse weather conditions and an escalation of conflicts in the Syrian Arab Republic and Iraq** have negatively impacted on crop production and food security.
- **In Central America, despite uncertainty regarding a possible El Niño occurrence, the current outlook for coarse grains production is positive.**
- **In South America, production prospects for coarse grains are favourable, despite an expected decline in maize production from last year's record level.** Wheat production is forecast to recover strongly from its two-year low, as sowings increased significantly in response to high prices.
- **FAO estimates that globally 33 countries, including 26 countries in Africa, are in need of external assistance for food due to conflict, crop failures and high domestic food prices or a combination of them.**
- **FAO is closely monitoring the development of a possible El Niño event, which could have implications on global cereal production.** Latest forecasts indicate a 70 percent probability of an occurrence during the Northern Hemisphere's summer.

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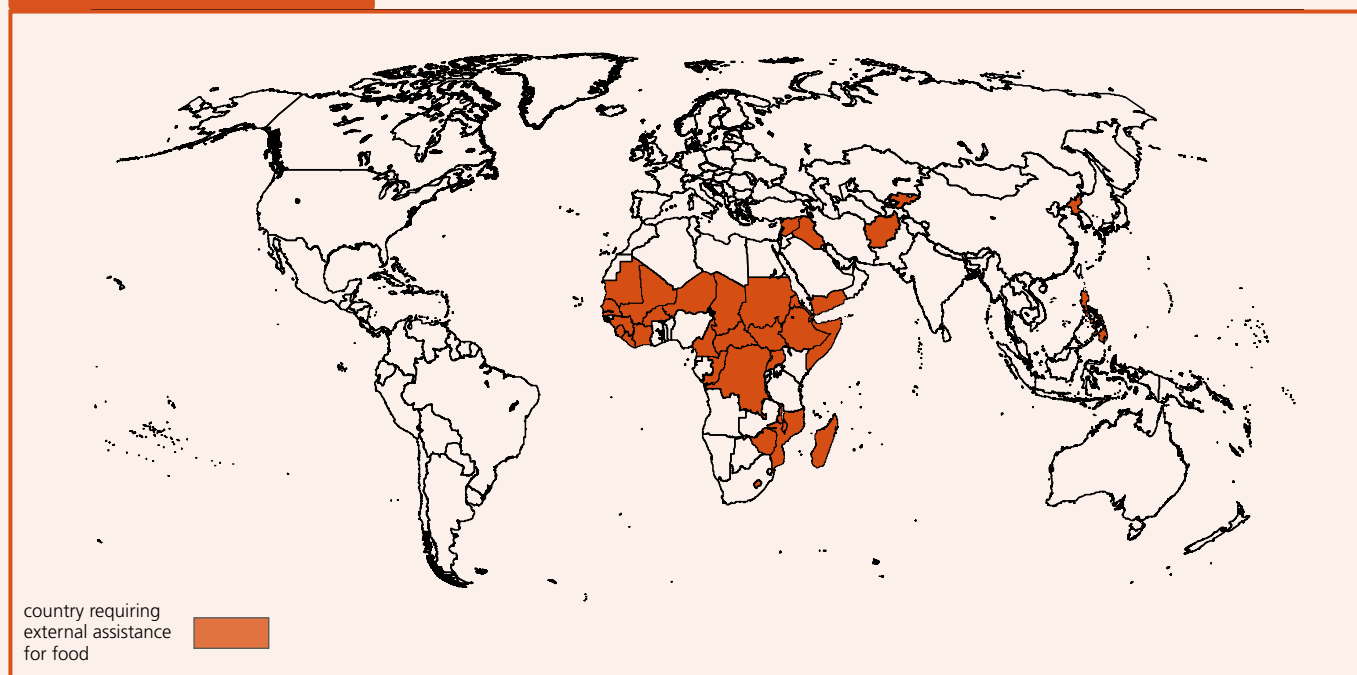
Selected international cereal prices



Note: Prices refer to monthly average. See Table 3 for details

Countries requiring external assistance for food¹

World: 33 countries



AFRICA (26 countries)

Exceptional shortfall in aggregate food production/supplies

Central African Republic

The food situation in 2014 remains serious due to continued conflict and displacements. Crop production in 2013 declined by 32 percent from the previous year due to prevailing civil insecurity. The number of people in need of food assistance was estimated in April 2014 at about 1.7 million, out of a total population of 4.6 million. The IDP caseload, as of late June, was estimated at 536 000 persons.

Zimbabwe

Food security conditions are expected to improve in 2014/15, on account of the production gain estimated this year. However, higher maize prices will continue to cause some access constraints.

Widespread lack of access

Bukina Faso

A massive influx of refugees from Mali has put additional pressure on local food supplies. Over 33 800 Malian refugees are estimated to be living in the country as of April 2014.

Chad

Influx of refugees, estimated at over 461 000 people from the Sudan's Darfur region, the Central African Republic and northern Nigeria, and the return of an estimated 340 000 Chadians, have put additional pressure on the local food supply negatively affecting food security.

Djibouti

About 124 000 people are severely food insecure, mainly in pastoral southeastern areas and in the Obock region, due to below-average March to May rains and reduced humanitarian assistance.

Eritrea

Vulnerability to food insecurity due to economic constraints.

Guinea

Despite improved access to food in recent months, driven mostly by lower prices of imported commodities, assistance is still needed to overcome the lingering effects of several years of high food prices.

Liberia

Slow recovery from war related damages, inadequate social services and infrastructure, poor market access and presence of some 42 000 Ivorian refugees in the country (as of June 2014) result in the need for continued international support.

Malawi

Cereal production in 2014 is estimated at an above-average level, resulting in improved food availability in 2014/15. However, localized production losses in parts of the north and south, due to a dry-spell, is likely to stress food security conditions in affected areas. Furthermore, despite some recent decreases, continuing high maize prices are expected to weigh heavily on food access.

Mali

Insecurity Insecurity in northern areas has resulted in large population displacement, worsening the already precarious food security situation created by previous droughts and floods. Over 1.9 million people, located mostly in the northern part of the country, were estimated to be in Phase 3: (Crisis) according to the last "Cadre Harmonisé" analysis.

Mauritania

Insecurity More than 60 700 Malian refugees were still living in southeastern Mauritania as of April 2014. Moreover, Mauritania continues to be affected by relatively high domestic food prices. Over 367 000 people are estimated to be in "Cadre Harmonisé" Phase 3: (Crisis) and above.

Niger

The country has been struck by successive severe food crises in recent years that resulted in depletion of household assets and high level of indebtedness. Another below-average crop was gathered in 2013. About 2.2 million people are estimated to be in Phase 3: (Crisis) and above according to the last "Cadre Harmonisé" analysis conducted in March 2014.

Sierra Leone

Despite improved access to food in recent months, driven mostly by lower prices of imported commodities, assistance is still needed to overcome the lingering effects of several years of high inflation rates.

Severe localized food insecurity**Cameroon**

In North and Far North regions, recurrent climatic shocks in recent years have negatively impacted agricultural activities, causing a deterioration in the food security situation. In addition, the number of refugees from the CAR which entered East, Adamaoua and North regions since December 2013 was estimated at 104 000 in late June 2014, while 5 300 refugees from Nigeria entered the Far North region since June 2013.

Congo

Significant food security problems are faced by a large number of households. In addition, as of early June 2014, about 17 000 refugees from the CAR are sheltering in the country.

Côte d'Ivoire

Conflict related damage to agriculture in recent years and the lack of support services, mainly in the northern regions. The 2011 post-election crisis forced thousands of people to leave the country and seek refuge, mostly in eastern Liberia where some 42 000 Ivorian refugees are currently living, as of June 2014.

Democratic Republic of the Congo

The number of people in need of food assistance was estimated in December 2013 at about 6.7 million. As of May 2013, the total number of IDPs was estimated at more than 2.6 million, while the refugees from CAR and forced returnees expelled from the Republic of the Congo were estimated at 60 000 and 130 000, respectively.

Ethiopia

Overall, the food security situation is stable after the good 2013 main "meher" season harvest and average "belg" season ongoing harvest. However, about 2.4 million people are still estimated to be in need of humanitarian assistance.

Lesotho

Food security conditions expected to be stable in 2014/15, with domestic cereal production estimated to remain near last year's level.

Madagascar

Following the sharp decline in rice production in 2013, the expected about average 2014 crop is anticipated to improve food availability and access. However, crop losses due to locusts and unfavourable climatic conditions, particularly in southern parts, will continue to stress food security conditions in affected areas.

Mozambique

Overall, food security conditions are expected to remain stable in 2014/15, with an estimated increase in 2014 cereal production. In addition, prices of maize have been declining, helping to improve food access. However, assistance is needed for households affected by heavy rains and floods.

Senegal

Cereal production in 2013 was estimated to be 15 percent below the average. Already in 2012, production shortfalls and high food prices led to a difficult food situation in several parts of the country. About 2.9 million people are estimated to be at risk of food insecurity this year.

Somalia

About 870 000 people are estimated to be in need of emergency assistance, mainly IDPs and poor households in some pastoral central and northwestern areas.

South Sudan

Since the conflict started in mid December 2013, the number of severely food insecure people increased dramatically to about 3.5 million, including 1.1 million IDPs.

Sudan

The number of people estimated to be in need of humanitarian assistance, mainly IDPs in conflict-affected areas, has increased to 5 million.

Uganda

About 100 000 people in Karamoja region are estimated to be severely food insecure following two years of below-average crop production.

ASIA (7 countries)**Exceptional shortfall in aggregate food production/supplies****Iraq**

Conflict escalation, together with large internal displacements, has coincided with winter crop harvesting, thus seriously compromising the final output.

Syrian Arab Republic

Due to worsening civil conflict, 6.3 million people are estimated to be facing severe food insecurity. Although some international food assistance is provided, the Syrian refugees are also putting strain on other countries in the region.

Widespread lack of access**Democratic People's Republic of Korea**

Despite a small increase in the aggregate food production for a third consecutive year in 2013/14, the food security situation remains unsatisfactory with 84 percent of households having borderline or poor food consumption. The food system in the DPRK remains highly vulnerable to shocks and serious shortages exist particularly in the production of protein-rich crops. The lean period, which lasts between May and August is expected to further aggravate the food security situation of much of the population of the country.

Yemen

The severely food-insecure population in need of emergency food assistance is estimated at 4.5 million people, 18 percent of the population, as a result of high levels of prolonged conflict, poverty, high food and fuel prices.

Severe localized food insecurity**Afghanistan**

Some groups, particularly IDPs displaced by the conflict, returnees from Pakistan and natural disaster-affected households continue to face high level of food insecurity.

Kyrgyzstan

The situation is stable and significantly improved. Some concerns still exist with high food prices combined with poverty and uncertainty with this year's cereal harvest.

The Philippines

Food insecurity remains a concern for the population affected by Typhoon Haiyan that hit nine regions across central parts of the Philippines on 8 November 2013. According to the latest official estimates, as of May 2014, more than 2 million people are still living without adequate shelter or housing, including at least 26 000 people still displaced. The recovery in the agriculture sector has begun; however, it is expected to take a few seasons to recover fully. Record-high prices of rice, the country's staple food are expected to further deteriorate the already tight food situation of vulnerable populations.

Countries with unfavourable prospects for current crops² (total: 4 countries)

AFRICA (3 countries)

Central African Republic

The widespread conflict, which caused the loss and the depletion of the households' productive assets, together with shortages and soaring prices of inputs, is expected to severely affect the outcome of the current cropping season.

Somalia

Below-average 2014 "gu" season harvest over major cropping areas in southern regions of Lower and Middle Shabelle, Hiran, Bakool and Gedo due to unfavourable weather and insecurity that hampered planting activities.

ASIA (1 country)

Syrian Arab Republic

Civil insecurity, high costs of production and reduced input availability have caused reduced plantings of the 2013/14 winter cereal crops.

Key - Changes since last report (March 2014)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

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

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

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

Global overview

GLOBAL CEREAL SUPPLY AND DEMAND ROUNDUP

Prospects for 2014 cereal production improve further

The outlook for global cereal supplies in the 2014/15 marketing season has improved further following an upward revision of the 2014 production forecast since last month. FAO's latest forecast for world **cereal production** in 2014 now stands at 2 498 million tonnes (including rice in milled terms), 18 million tonnes up from the previous figure in June, although still 1 percent (23 million tonnes) below last year's record output. The recent upward revision reflects improved production prospects for coarse grains and wheat crops, particularly in the United States, the EU and India.

With the bulk of the winter **wheat** crop in the Northern Hemisphere being harvested, FAO is now forecasting global wheat output at 707 million tonnes, 1.4 percent down from the previous year's record. The reduction is largely driven by declines in the United States, following a severe drought, and in Canada, where plantings were sharply reduced in response to low prices. With harvesting nearly concluded in the Near East, latest indications point to an 7.3 percent decrease in the subregion's aggregate wheat production, mostly due to drought conditions that led to an 10 percent contraction in Turkey. North Africa is also expected to gather a smaller wheat harvest this year, mainly reflecting a below-average output in Morocco. These declines are expected to more than offset increases in some other countries, in particular India and China, where record outputs are forecast, and the EU, where moderate gains are foreseen. In the major producing CIS countries, production is expected to remain stable, with the

exception of Ukraine, where a return to average yields from last year's record level may result in a 2 million tonne decline. The early outlook in the large producing Southern Hemisphere countries remains positive, with an expansion in plantings expected to boost production, assuming favourable climatic conditions for the remainder of the season.

FAO's forecast for world **coarse grains** production now stands at 1 287 million tonnes, 1 percent up from the previous figure following improved prospects in the United States, but nevertheless 1.5 percent lower than the record output in 2013. The year-on-year expected decrease mainly reflects reduced maize outputs in South America (Brazil and Argentina), following a contraction in plantings and lower yields. Maize yields in India are also expected to decrease from their records in 2013, contributing to a 8 percent production decline. Lessening the impact of decreases elsewhere, the 2014 output in the United States, estimated at 354 million tonnes, is at a comparable level to the previous year's

record production, as record yields are anticipated to compensate for a somewhat smaller planted area. In China, which accounts for the bulk of the maize crop in Asia, current forecasts point to a small production increase. In Africa, the aggregate maize output is foreseen to increase by 3 percent, largely on account of sharp gains in Southern Africa from last year's drought-reduced level.

FAO has upgraded its June forecast for **rice** production in 2014 by about 800 000 tonnes to 755.4 million tonnes (503.6 million tonnes, milled basis). The revision reflects improved prospects for Myanmar, Pakistan and the United Republic of Tanzania, which more than outweighed a deterioration of results in Brazil and Australia. At the current forecast, world production will be 1.2 percent (8.7 million tonnes) larger than in 2013, about half the rate of growth witnessed in the previous ten years. All countries in the Southern Hemisphere have harvested their 2014 main paddy crops, with some engaged in the cultivation of secondary crops. The 2014 rice season is less advanced in Northern Hemisphere countries, which comprise the leading producers. Production growth in Asia is predicted to be particularly subdued, with an expected

Figure 1. World cereal production and utilization

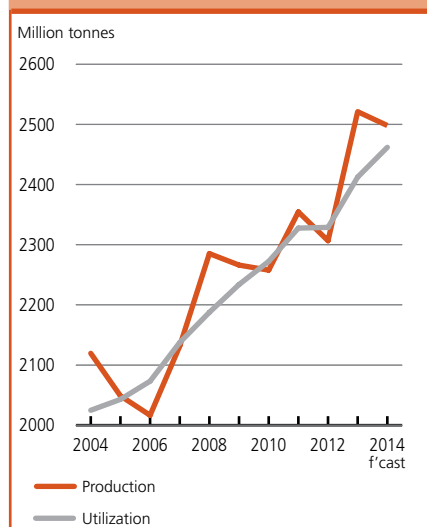
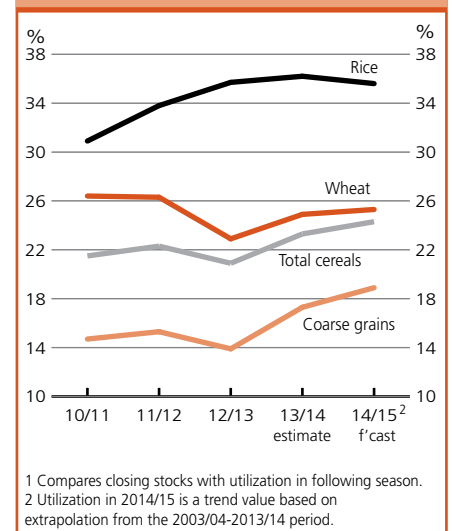


Figure 2. Ratio of world cereal stocks to utilization¹



increase of 1 percent, amid concerns over the potential impact of El Niño. Bangladesh, China, India, Indonesia, Myanmar and the Philippines, where government support to the sector remains strong, are expected to account for most of the growth in the region. The outlook for Africa is more positive, with an expected year-on-year increase of 3.6 percent, mainly driven by an anticipated recovery in Madagascar. In Latin America and the Caribbean, production is estimated to expand by 1.3 percent, largely on the back of gains in Brazil.

FAO is closely monitoring the development of a possible El Niño event, with current meteorological forecasts indicating a 70 percent probability of an episode occurring during the Northern Hemisphere's summer. Given the potential climatic variations (including reduced rains in parts of Asia), FAO will continue to assess the evolution of El Niño and the possible implications on global cereal production.

FAO's forecast for world cereal **utilization** in 2014/15 has been lowered marginally since June. The major revisions concerned a sharp reduction in industrial and feed use of maize in China, which was largely offset by increases in the United States, EU, Ukraine and Brazil. At 2 462 million tonnes, world cereal consumption is anticipated to grow by 2.1 percent (50 million tonnes) above the 2013/14 level. More than half of the 50 million tonne annual increase would correspond to coarse grains, the utilization of which is foreseen to rise by 2.1 percent to 1 260 million tonnes, underpinned by greater maize usage, both as feed in China and for ethanol in the United States. Consumption of rice is also forecast to register a relatively fast growth of 2.4 percent to 502 million tonnes in 2014/15, while a more modest 1.8 percent gain to 699 million tonnes is predicted for wheat. Overall, the volume of cereals destined for food is projected

	2012	2013 estimate	2014 forecast	Change: 2014 over 2013 (%)
Asia	1 092.0	1 123.8	1 127.1	0.3
Far East	995.7	1 016.7	1 025.1	0.8
Near East	69.2	74.1	68.5	-7.6
CIS in Asia	27.0	33.1	33.5	1.3
Africa	162.9	162.2	166.9	2.9
North Africa	33.9	36.0	34.5	-4.1
Western Africa	50.6	50.1	50.3	0.4
Central Africa	4.6	4.7	4.7	-1.6
Eastern Africa	44.0	42.5	44.2	4.0
Southern Africa	29.7	28.9	33.2	14.7
Central America and Caribbean	39.9	40.8	40.9	0.2
South America	154.6	173.7	170.3	-2.0
North America	406.1	500.2	482.0	-3.6
Europe	415.5	477.9	473.7	-0.9
EU	278.6	302.4	304.4	0.7
CIS in Europe	124.1	161.8	155.3	-4.0
Oceania	35.7	42.4	37.1	-12.6
World	2 306.6	2 521.1	2 498.1	-0.9
Developing countries	1 398.2	1 443.8	1 446.5	0.2
Developed countries	908.4	1 077.3	1 051.6	-2.4
- wheat	660.3	716.9	707.2	-1.4
- coarse grains	1 155.4	1 306.4	1 287.3	-1.5
- rice (milled)	490.9	497.8	503.6	1.2

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

to progress by 15 million tonnes, or 1.3 percent, compared to 2013/14, resulting in a modest 0.3 percent gain in per caput intake to 153.4 kg per year, of which 67.3 kg corresponding to wheat and 57.6 kg to rice. The expansion in cereal feed utilization is anticipated to be more pronounced than for food, with a forecast expansion of 17 million tonnes, or 2 percent, to close to 870 million tonnes. The growth mainly concerns coarse grains, in particular maize, but also wheat in the EU.

The FAO forecast for world cereal **stocks** by the close of 2015 crop seasons has been raised by 5 percent (28 million tonnes) since last month, to 604 million tonnes. This would represent a 5.3 percent (30 million tonnes) increase from the 2013/14 season and the highest level since 2001. Based on the latest stock and utilization forecasts, the global cereal stocks-to-use ratio would reach a 12-year high of 24.3 percent, up from 23.3 percent

in 2013/14. Global maize inventories are expected to reach 200 million tonnes in 2015, 31 million tonnes higher than previously anticipated, with much of the revision reflecting upward adjustments following a lowering of maize utilization in China. As a result, world coarse grains carryovers are set to close the season with a 10 percent (23 million tonnes) year-to-year increase to 241 million tonnes. The level of global wheat stocks in 2015 is put at 180 million tonnes, slightly below the June forecast, but 3.5 percent higher than their opening levels. Amid more buoyant production prospects, rice closing inventories were adjusted upwards to 183 million tonnes, 1.3 million tonnes above the level estimated for 2014.

International cereal **trade** in 2014/15 is currently set at 332.3 million tonnes, nearly unchanged since June and 4 percent below the 2013/14 record. The decline from 2013/14 reflects a fall in shipments of coarse grains and

Table 2. Basic facts of world cereal situation

(million tonnes)

	2012/13	2013/14 estimate	2014/15 forecast	Change: 2014/15 over 2013/14 (%)
PRODUCTION¹				
World	2 306.6	2 521.1	2 498.1	-0.9
Developing countries	1 398.2	1 443.8	1 446.5	0.2
Developed countries	908.4	1 077.3	1 051.6	-2.4
TRADE²				
World	309.9	346.5	332.3	-4.1
Developing countries	126.8	107.9	108.2	0.2
Developed countries	183.1	238.6	224.1	-6.1
UTILIZATION				
World	2 328.8	2 412.4	2 461.9	2.1
Developing countries	1 494.6	1 540.3	1 577.2	2.4
Developed countries	834.2	872.1	884.7	1.4
Per caput cereal food use (kg per year)	152.3	152.9	153.2	0.2
STOCKS³				
World	503.1	573.9	604.1	5.3
Developing countries	385.9	433.0	449.3	3.8
Developed countries	117.2	140.9	154.7	9.8
WORLD STOCK-TO-USE RATIO%	20.9	23.3	24.3	4.1

Note: Totals and percentage change computed from unrounded data.

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

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

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

wheat, while trade in rice is expected to grow slightly. International trade in coarse grains in 2014/15 (July/June) is now forecast at 144 million tonnes, unchanged from last month. Compared to 2013/14, the 6 percent decline in coarse grains trade principally concerns maize, as demand by the EU, which had soared in 2013/14, is anticipated to return to more normal levels. Prospects for trade in wheat in 2014/15 (July/June) also remain at 149 million tonnes: although exports by the Russian Federation and the EU were raised following an upgrading of their production, the changes were offset by a lowering of shipments from India, Kazakhstan and the United States. Based on current expectations, wheat trade would fall by 3.6 percent year-on-year, to 149 million tonnes, reflecting reduced exports by the EU, India, Ukraine and the United States. International trade in rice in the 2015 calendar year is anticipated to

hover around 39.3 million tonnes, 300 000 tonnes more than foreseen last month and slightly above the record expected for

2014. Export prospects in 2015 improved for Pakistan, Thailand and the United Republic of Tanzania, while those by India were downgraded. Indonesia and Malaysia were responsible for much of the revision in the 2015 import forecast. Compared with 2014, exports by Thailand are expected to surge above last year, with sizeable gains also expected for Australia, China, Guyana, Paraguay and the United States. These increases would be mainly at the expense of India, which is projected to cut exports by 15 percent in 2015.

INTERNATIONAL PRICE ROUNDUP

International **wheat** prices declined considerably in June. After rising for four consecutive months, the benchmark US wheat (No.2 Hard Red Winter) fell by 9 percent and averaged USD 314 per tonne. Wheat export prices have fallen below the corresponding period in 2013, pressured by favourable crop prospects in 2014, currently being harvested in the Northern Hemisphere, and expectation of plentiful supplies in the 2014/15 season.

Export prices of **maize** also decreased significantly in June, with the benchmark US maize (No.2, Yellow) averaging USD

Table 3. Cereal export prices*

(USD/tonne)

	2013			2014			
	June	Jan.	Feb.	March	April	May	June
United States							
Wheat ¹	321	288	303	334	340	345	314
Maize ²	300	198	209	222	224	217	202
Sorghum ²	246	216	224	228	226	223	220
Argentina³							
Wheat	310	330	328	340	361	372	365
Maize	265	215	218	226	229	224	204
Thailand⁴							
Rice, white ⁵	550	457	466	430	408	408	419
Rice, broken ⁶	518	309	311	312	307	298	313

*Prices refer to the monthly average.

¹ No.2 Hard Red Winter (Ordinary Protein) f.o.b. Gulf.

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

202 per tonne, 7 percent lower than in the previous month and one-third below its level a year earlier. The drop in international prices in June reflects the positive outlook for this year's maize production in the major producing countries, particularly in the United

States, China and several countries in South America.

International **rice** prices rebounded slightly in June 2014, sustained by a recovery in Thailand, after the Government suspended the sales of rice from public stocks. In particular,

Thai fully broken rice (A1 Super) gained 5 percent, reversing most of the decline endured in the past few months. As for the benchmark Thai white 100%B, the quotation rose by 2.6 percent nearing USD 419 per tonne. Prices in other origins were little changed.

Low-Income Food-Deficit Countries food situation overview ¹

The aggregate LIFDC cereal output is expected to increase slightly over the previous

Harvesting of the winter cereal crops, mainly wheat and barley, in Northern Hemisphere countries and the summer (rainy) season crops, primarily coarse grains, in Southern Hemisphere countries is nearly complete. Sowing of the main season's summer crops, rice and coarse grains, is underway in Northern Hemisphere countries, while the secondary season winter crops are expected to be harvested from October in the Southern Hemisphere.

FAO's 2014 early forecast for LIFDCs indicates a cereal production of about 448 million tonnes, about 1 percent higher than last year. **Southern Africa**, mainly due to large gains in Zimbabwe and Madagascar, is expected to register a significant annual increase of about 17 percent to 11.6 million tonnes over last year's reduced level. In **Eastern Africa**,

an above-average cereal production of about 44.2 million tonnes is forecast. However, a decline in production is expected in Kenya due to a late start of seasonal rains and a prolonged dry spell in April. Early forecasts in **Central African** countries point to a small overall decrease,

on account of erratic rains in parts and insecurity that disrupted cropping activities. In **Western Africa**, cereal crops are at different stages of growth and harvesting is expected to commence from September; current prospects are uncertain, due to the rainfall forecasts

Table 4. Basic facts of the Low-Income Food-Deficit Countries (LIFDCs) cereal situation (million tonnes, rice in milled basis)

	2012/13	2013/14 estimate	2014/15 forecast	Change: 2014/15 over 2013/14 (%)
Cereal production¹	441.7	443.1	448.0	1.1
<i>excluding India</i>	199.9	200.3	204.3	2.0
Utilization	455.0	467.4	475.9	1.8
Food use	373.6	382.4	389.6	1.9
<i>excluding India</i>	181.7	185.6	189.0	1.8
Per caput cereal food use (kg per year)	0.1	0.2	0.2	0.1
<i>excluding India</i>	0.1	0.1	0.1	-0.4
Feed	29.4	30.7	31.3	2.2
<i>excluding India</i>	21.6	22.6	23.2	2.5
End of season stocks²	88.7	88.6	88.8	0.2
<i>excluding India</i>	39.3	37.5	35.4	-5.5

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

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

¹ The **Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011). The current 2014 FAO list has been recently revised, with seven countries graduating, these are: **Cambodia, Egypt, Indonesia, Iraq, Kiribati, Lao People's Democratic Republic and Zambia**. Of these, Cambodia, Lao PDR and Zambia graduated from the list on the basis of net food-exporter criterion, while the other four (Egypt, Indonesia, Iraq and Kiribati) graduated based on income criterion. For full details see: <http://www.fao.org/countryprofiles/lifdc/en/>

Table 5. Cereal production¹ of LIFDCs
(million tonnes)

	2012	2013 estimate	2014 forecast	Change: 2014 over 2013 (%)
Africa (37 countries)	109.7	107.2	110.7	3.3
Eastern Africa	43.9	42.5	44.2	4.0
Southern Africa	10.5	9.9	11.6	16.9
Western Africa	50.6	50.1	50.3	0.4
Central Africa	4.6	4.7	4.6	-1.6
Asia (13 countries)	330.1	334.0	335.2	0.4
CIS in Asia	9.6	10.1	9.9	-2.0
Far East	313.2	316.6	318.1	0.5
- India	241.8	242.8	243.7	0.3
Near East	7.3	7.2	7.2	-0.9
Central America (3 countries)	1.8	2.0	2.1	4.6
Oceania (2 countries)	0.0	0.0	0.0	8.8
LIFDC (55 countries)	441.7	443.1	448.0	1.1

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

for the subregion that indicate normal to below-normal rains until September.

In the **Far East Asia**, a minor cereal production increase is forecast reflecting projected gains in India and the Philippines. However, a sharp decrease is estimated in Sri Lanka following a reduction in plantings and poor rains during the main season, with crops harvested between

February and April. In the **CIS Asian** countries, where the main winter cereal crop harvests are being concluded, a small decline is forecast; however, production is still expected to remain above average. In **Central America**, preliminary estimates point to an increased 2014 cereal crop, currently being harvested, due to generally favourable rains.

Cereal imports for 2014/15 forecast slightly above last year's near-average level

Cereal imports of LIFDCs for the 2014/15 marketing year are forecast at a near-average level of 50.1 million tonnes, slightly above last year's high level. Higher imports are projected in **Central Africa** and **Western Africa**, due to expectations of smaller domestic harvests in some countries. Similarly, in **Eastern Africa**, cereal imports are forecast to increase, mainly due to higher import requirements in Kenya, on account of an anticipated decline in this year's production. Conversely, a decrease is forecast in the **Far East Asia** subregion, mainly due to improved domestic outputs in the large importing countries, including Bangladesh and the Philippines, and in **CIS Asia**, mainly on account of large carryover stocks. Significant increases in national harvests in **Southern Africa** resulted in lower import requirements compared to the high level of 2013/14. Elsewhere, in **Central America**, the **Near East** and **Oceania**, cereal purchases

Table 6. Cereal import position of LIFDCs
(thousand tonnes)

	2012/13 or 2013	2013/14 or 2014				2014/15 or 2015	
		Requirements ¹		Import position ²		Requirements ¹	
		Actual imports	Total imports:	of which food aid	Total imports:	of which food aid pledges	Total imports:
Africa (37 countries)	25 831	28 044	1 578	6 462	430	28 193	1 355
Eastern Africa	7 219	8 088	1 045	2 583	330	8 383	871
Southern Africa	1 996	2 737	164	1 611	44	2 257	149
Western Africa	14 537	15 098	224	1 970	42	15 374	191
Central Africa	2 079	2 121	145	298	15	2 179	145
Asia (13 countries)	16 568	19 999	493	8 595	143	19 508	561
CIS in Asia	3 644	3 877	1	3 231	0	3 743	1
Far East	8 172	11 106	341	3 985	83	10 698	409
Near East	4 752	5 017	151	1 379	60	5 067	151
Central America (3 countries)	1 822	1 949	102	814	14	1 949	102
Oceania (2 countries)	433	458	0	70	0	458	0
Total (55 countries)	44 655	50 451	2 173	15 942	587	50 108	2 019

Note: Totals computed from unrounded data.

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

² Estimates based on information available as of early June 2014.

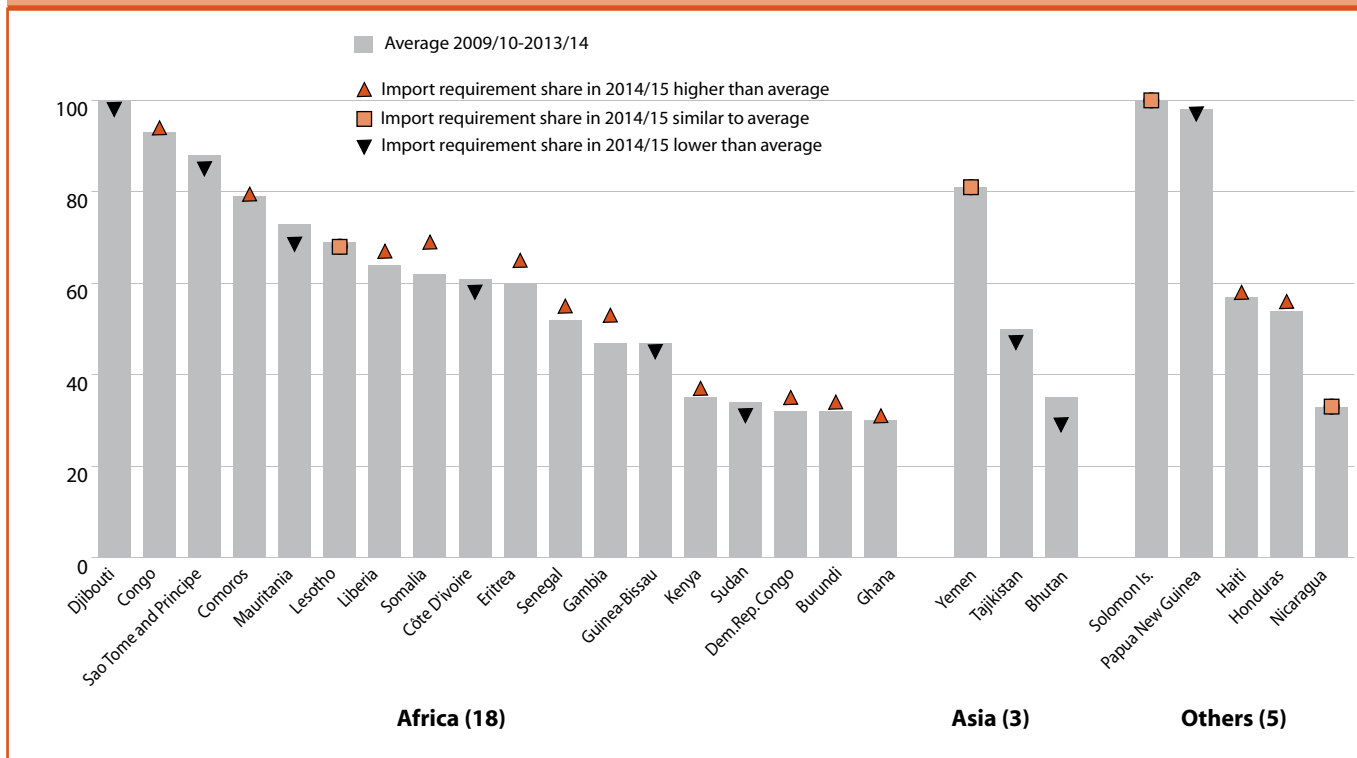
are anticipated to remain virtually unchanged from the previous year.

As seen in Figure 3, a total of 26 LIFDCs have been listed as having high cereal import dependency, measured by

the import share in the past five years averaging 30 percent or higher in total domestic utilization. Of these, the bulk of the countries are in Africa (18). A sharp increase in the import share is preliminarily

forecast for Eritrea, the Gambia and Somalia. By contrast, the share of cereal imports in total domestic utilization is forecast to decrease markedly in Bhutan and Mauritania.

Figure 3. Share of imports in total domestic utilization of cereals (where average share is 30 percent or more)



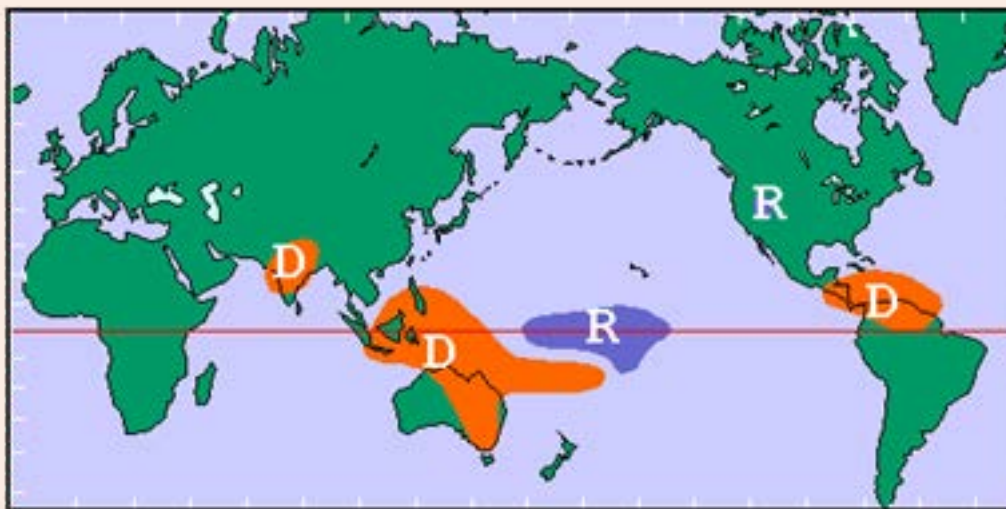
El Niño 2014/15: possible impact on cereal production

El Niño is a recurrent weather phenomenon that takes place approximately every two to seven years and usually lasts between 12 and 19 months. An El Niño event is defined by a high Oceanic Niño Index (ONI), which is based on Sea Surface Temperature (SST) departures from the average in a central equatorial Pacific region. An El Niño episode is associated with persistent warmer-than-average SSTs and consistent changes in wind and rainfall patterns at the global level.

Current El Niño conditions remained neutral as of the end of June. However, meteorological forecasts indicate a 70 percent probability of an episode occurring during the Northern Hemisphere's summer, and 80 percent during the autumn or winter. The latest predictions follow a recent rise in the equatorial SST in the preceding months and indicate a large potential for an El Niño reaching peak strength during the fourth quarter of 2014. Although there still remains uncertainty regarding the potential severity, forecasts point to a moderate strength event developing rather than either a weak or strong El Niño.

Previous El Niño episodes have caused climatic variations and consequently had significant impacts on agriculture, with consequent implications for food security. However, no precise quantitative correlation between the occurrence of El Niño and changes in agricultural production has been established and it is, therefore, difficult to accurately map the impact of El Niño. The effect on agriculture will depend on the timing and severity of the episode, as well as the crop calendar in a particular region. However, taking into account historical incidents during previous El Niño events, it is possible to provide an indication of potential impacts on crop production during the Northern Hemisphere summer (April-September).

Map 1: Possible climatic variations and impacts
April-September



KEY:

R = Above average rains

D = Drier than average

Southern Africa: No significant variation from normal weather patterns has been observed during past events, which encompasses the end of the main cropping season's harvest and the dry season.

Eastern Africa: During the main cropping period, March-November, previous episodes have not been associated with a significant divergence from normal weather patterns until September. However, potential above-normal rainfall from October is associated with El Niño, which may disrupt harvesting of the main season cereal crops and negatively affect production of the second season.

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Asia: Increased chance of below-average precipitation, historically concentrated in southeastern areas, Indonesia and the Philippines in particular, as well as in parts of India, may affect planting of the main season rice and maize crops that normally begins from late May. In particular, northern India has tended to receive below average monsoon rains (June-October), with a negative impact on the main Kharif season crops (predominantly rice and largely rain-fed). This season, despite a late start of the monsoon season in India, good rains were received in the second half of June improving soil conditions for field operations.

Oceania: Tendency for reduced precipitation in eastern Australia (this area contributes to about 50 percent of the total national wheat output) between June and November (winter/spring), which could negatively impact yields. As of early July, no weather anomalies have been reported.

Latin America and the Caribbean: In Central America, an El Niño event is largely correlated with below-normal precipitation affecting yields of the main cereal cropping season and planting of the second season, which could potentially dampen production. This year generally favourable weather has generally prevailed with above-average rains in mid-June. In South America, the El Niño phenomenon is associated with below-normal precipitation in northern parts of the subregion, which could reduce crop production. By the end of June, the maize and rice crops were harvested and prospects are favourable. In southern parts of the subregion (including Brazil and Argentina), above-normal rains towards from October, associated with the occurrence of El Niño, may affect the quality of the wheat harvest and plantings of the 2014 maize crop.

North America: Northern parts of the US, including the Corn Belt in the Midwest, have tended to receive below average rains in the first six months of the year during an El Niño episode, with planting of the main summer coarse grains crops beginning in March. However, this year no significant abnormal weather patterns have been observed, and current reports indicate good to excellent maize crop conditions.

Regional reviews

Africa

North Africa

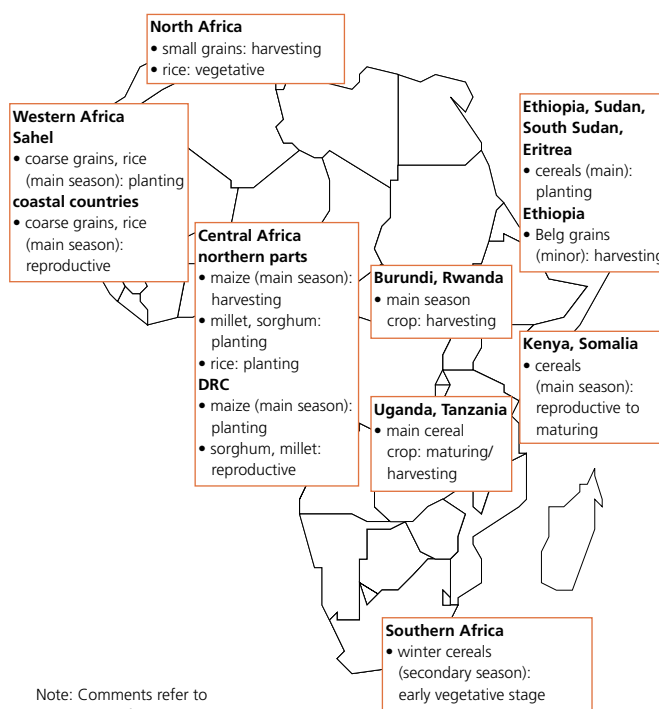
Average prospects for the 2014 cereal crops

Harvesting of the 2014 winter cereal crops started in May/June in most countries of the subregion. Hot weather encouraged early harvesting in **Morocco** and **Tunisia**, while rains in **Algeria** slowed down the ripening of the crops. Early forecasts indicate an overall average cereal crop at the subregional level owing to favourable weather conditions. In Algeria and Tunisia, early forecasts for wheat production point to above-average harvests, despite abundant rains in northern regions of Tunisia during December. In **Egypt**, an average crop is forecast while in Morocco a below-average crop is expected. Last year Morocco gathered an exceptionally high cereal harvest.

Overall, FAO forecasts the subregion's aggregate wheat output at 19.3 million tonnes, about 5 percent down on last year's good crop, and 3 percent up on the previous five-year average. The barley crop is put at about 4.1 million tonnes, 13 percent and 18 percent below last year and the average, respectively.

Cereal import requirements in 2014/15 expected to remain similar to last year

North African countries rely heavily on wheat imports from the international market to cover their consumption needs, with **Egypt** being the world's largest importer. With average prospects for 2014 crops in several countries, the import requirements for the 2014/15 marketing year (July/June) are forecast at similar levels to last year.



Mixed trends in food inflation across the subregion

Trends in food inflation during the past several months were mixed, with increases in Egypt and Tunisia, decreases in Algeria and stable rates in Morocco. In **Algeria** in April 2014 the Consumer Price Index (CPI) increased by 1.4 percent and 0.1 percent compared to the previous month and previous year, respectively. The year-on-year price increase for bread and cereals was 1.6 percent in April 2014, while white meat prices increased by almost 14 percent. In **Egypt**, the annual food and beverage inflation rate in May 2014 reached about 11.7 percent. The increase was attributed to the depreciating exchange rate and bottlenecks in fuel distribution. In **Tunisia**, food and beverage prices in May 2014

Table 7. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
North Africa	18.0	20.3	19.3	11.7	11.5	11.0	6.0	6.2	6.1	35.8	37.9	36.4	-3.9
Algeria	3.4	3.3	3.4	1.6	1.6	1.6	0.0	0.0	0.0	5.0	4.9	5.0	2.2
Egypt	8.8	8.8	9.0	7.8	6.5	6.6	5.9	6.1	6.0	22.5	21.4	21.7	1.1
Morocco	3.9	7.0	5.0	1.4	2.9	1.9	0.1	0.1	0.1	5.3	10.0	7.0	-30.0
Tunisia	1.8	1.0	1.7	0.8	0.3	0.7	0.0	0.0	0.0	2.6	1.3	2.5	89.1

Note: Totals and percentage change computed from unrounded data.

climbed 7.2 percent on a year-on-year basis. In **Morocco**, the food inflation decreased by 1 percent in 12 months until the end of April 2014.

Despite increasing food inflation, bread and cereal inflation across the subregion remains low, partly due to the generous food subsidies system. While subsidies are likely to remain, there is an ongoing discussion about their cost (including the large import bill and administrative costs) and the related food waste.

Western Africa

Mixed early prospects for 2014 cereal crops

Planting of the first 2014 maize crop, to be harvested from July, was completed in May in southern parts of the coastal countries along the Gulf of Guinea. Planting of coarse grains is progressively moving northwards in these countries with the onset of the rains. By contrast, seasonably dry conditions prevailed in most of the Sahelian zone where planting usually starts in June/July.

Early prospects are mixed in the coastal countries. In the western part of the subregion including Guinea, Liberia and Sierra Leone, rains and soil moisture have been generally adequate due to widespread and abundant precipitations since the beginning of the cropping season. By contrast, below-average precipitation and vegetation indexes were registered in parts of the eastern countries, notably in central Nigeria. These rainfall trends are in line with the joint forecast by the African Centre of Meteorological Applications for Development (ACMAD) and the Agrhymet Centre. According to the forecast, there is an increased probability of normal to below-normal rainfall between June and September for most countries of the subregion including the Sahelian belt, which receives about 80 percent of its annual precipitation during this period.

Good cereal harvest gathered in 2013

Latest official estimates put the subregion's aggregate 2013 cereal output, consisting mostly of coarse grains, at about 55.1 million tonnes, which is similar to the previous year's bumper crop and 10 percent above the average of the previous five years. However, in the Sahel, aggregate 2013 cereal production estimated at about 19.6 million tonnes, was about 12 percent down on the 2012 good harvest, but similar to the five-year average. Output declined significantly in most Sahelian countries, notably in **Niger** by 19 percent, in **Chad** by 17 percent, in **Senegal** by 15 percent and in **Mali** by 14 percent. The decline in cereal

production in the Sahel was offset by a good harvest in the coastal countries along the Gulf of Guinea. In **Nigeria**, the largest producer of the subregion, cereal production is estimated to have increased by 20 percent compared to the 2012 flood-affected output.

Coarse grains prices generally continue to follow normal seasonal patterns

Reflecting adequate supplies at the subregional level, following last year's above-average harvest, coarse grains prices have been mostly stable in recent months in both Sahelian and coastal countries. The main exception is Nigeria where prices have exhibited a higher volatility.

In Sahelian countries, millet prices have been mostly stable over the last three months in Bamako (**Mali**), Niamey (**Niger**) and Ouagadougou (**Burkina Faso**). Overall, coarse grains prices were at low levels, below those of a year earlier. However, coarse grains prices have been less stable and seasonal declines less pronounced in a few countries, notably those which experienced a significant drop in production last year.

In **Chad**, millet prices in March in Abeche and N'Djamena were one-third higher than year earlier levels due to tight supplies following last year's reduced cereal output. Similarly, in **Senegal**, millet prices in several markets, including Dakar and Saint-Louis, have been higher than the previous year. Several consecutive years of below-average coarse grains harvests have led to relatively tight market supplies in the country. In the coastal countries along the Gulf of Guinea, after several months of stability, prices of maize, the staple cereal, started increasing in March in most markets in **Benin** and **Togo**. Although prices continued to seasonally increase in April in these countries, prices were still generally well below their levels of April 2013. In **Nigeria**, maize prices have been more volatile in recent months in the main northern Kano market. Following a steep drop during the first 2013 season harvest period, prices have followed an upward trend between November 2013 and March 2014, before declining again in

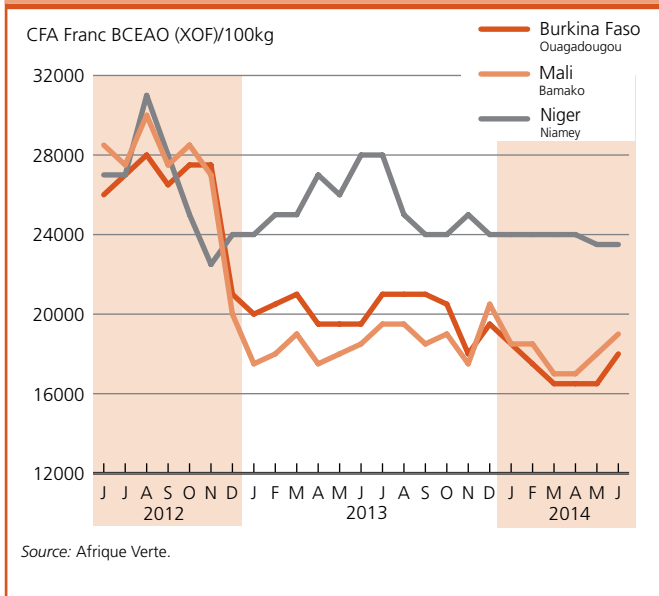
Table 8. Western Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Western Africa	42.5	41.3	41.3	12.7	13.7	14.0	55.3	55.1	55.4	0.6
Burkina Faso	4.6	4.6	4.3	0.3	0.3	0.4	4.9	4.9	4.6	-5.1
Chad	3.0	2.2	2.5	0.2	0.4	0.4	3.2	2.6	2.9	8.9
Ghana	2.4	2.2	2.0	0.5	0.5	0.5	2.9	2.6	2.6	-2.5
Mali	4.7	3.5	4.1	1.9	2.2	2.3	6.7	5.7	6.4	12.1
Niger	5.3	4.3	4.9	0.1	0.1	0.1	5.3	4.3	4.9	14.5
Nigeria	16.5	18.5	17.4	4.4	4.7	4.6	20.9	23.3	22.1	-5.2

Note: Totals and percentage change computed from unrounded data.

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

Figure 4. Millet prices in selected Western African markets



April. Trade disruptions, resulting from the escalating insecurity in northern parts of the country, have been sustaining price instability despite the good 2013 cereal production.

Prices of imported rice, a key staple in urban centres, have also remained generally stable, in both the Sahel and in coastal countries. In **Senegal**, large imports since the beginning of the year, coupled with stabilization measures adopted by the Government, have maintained relatively stable prices. Rice prices have also been stable in recent months in **Mali**, including in the northern regions of Tombouctou and Gao, where insecurity had previously led to trade disruptions and higher price variability.

Food and agricultural assistance continues to be needed in the region

In spite of the above-average cereal harvest gathered at the regional level in 2013, humanitarian assistance is still needed in several parts, due mostly to the continuing civil conflict in the **Central African Republic (CAR)**, **Mali** and northern **Nigeria** that has resulted in large population displacement in the subregion. For example, in **Chad**, civil conflict in the Sudan, the CAR, Nigeria and Libya, has increased the number of refugees and returnees. As of March 2014, more than 461 000 refugees were living in Chad, while about 340 000 Chadians have returned to their country. The country has received over 102 400 new refugees and returnees from December 2013 through March 2014. Similarly, according to OCHA, more than 520 000 people, mostly women, children and the elderly, are internally displaced in Nigeria and over 57 000 have sought refuge in neighbouring countries (Cameroon, Niger and Chad) as of February. Borno State hosts the largest number of

displaced people, about 111 000 people according to the National Emergency Management Agency. In addition, about 150 000 Malian refugees are still living in neighbouring countries, including 60 000 in **Mauritania**, 40 000 in **Niger** and 50 000 in **Burkina Faso**.

The refugee crisis has exacerbated an already fragile food situation in the region. Most Sahelian countries have been struck by successive severe food crises in recent years that have had very adverse, longer-term impact on household assets and savings. As a result, over 20 million people are estimated to be in need of food assistance in the region, including 4.2 million in northern Nigeria, 4.2 million in Niger, 3.3 million in Mali, 2.4 million in Chad, 2.25 million in Senegal, 1.3 million in Burkina Faso, 470 000 in Mauritania and 285 000 in the Gambia. The United Nations and humanitarian partners launched a three-year Regional Strategic Response Plan (RSRP) earlier this year to provide aid to millions of people in nine countries of the Sahel belt. The RSRP is seeking to mobilize USD 2 billion to provide food and non-food assistance to nearly 30 million people across the subregion.

Central Africa

Favourable rains boost prospects in the current cropping season; however, continued conflict has negatively affected prospects in the CAR and parts of the DRC

The main season maize crops, sown in March, will be harvested from July in the central and southern parts of **Cameroon** and the **CAR**. In **Cameroon**, crop growing conditions have been generally favourable with the exception of some areas, where early season dryness in March was followed by near-average rains in April and May. By contrast, in the **CAR**, despite some rainfall deficits in western parts, favourable weather conditions generally prevailed during the cropping season in most provinces. However, crop production is expected to be negatively affected by the widespread conflict, which caused the loss and depletion of already inadequate household productive assets, together with shortages and soaring prices of inputs. To help averting a full-scale nutrition and food security crisis in the coming months and to respond to the needs of crisis-hit farmers, the Food Security Cluster, co-led by FAO and WFP, plans to assist 80 000 farming households countrywide with the distribution of tools and 1 800 tonnes of seeds. As of 24 June 2014, 68 318 households (85 percent of the initial target) were reached.

In addition, FAO plans to support a further 30 000 households by distributing tools and seeds of sorghum, beans, sesame and millet as part of the short-cycle agricultural season, whose planting is expected to last until the end of July. However, rising levels of insecurity affected transportation and distributions of inputs, while funding constraints limited the scope of the operations.

In the **DRC**, the harvest of the second season crops is almost complete in the centre and in the south, while it is about to

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Central Africa	4.3	4.4	4.3	0.5	0.5	0.5	4.8	4.9	4.8	-1.5
Cameroon	2.8	2.9	2.9	0.1	0.2	0.2	3.0	3.1	3.1	-1.2
Central Africa Rep. Dem.Rep.of the Congo	0.2	0.1	0.1	0.0	0.0	0.0	0.2	0.2	0.2	-0.6
Congo	1.2	1.3	1.2	0.3	0.3	0.3	1.6	1.6	1.5	-2.3

Note: Totals and percentage change computed from unrounded data.

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

start in the north. According to remote sensing analysis, in several provinces of the Centre/East (Bandundu, Bas Congo, Kasai Occidental, Kasai Oriental, Maniema) and in the northern Equateur province, abundant rainfall in January/February was followed by reduced precipitation in March/April. In the rest of the country, adequate and well-distributed rains were received during the cropping period.

In **Congo** and **Gabon**, where the harvest of the second season crops has just started, well-distributed rainfall was received. However, in both of these countries, the bulk of the national cereal utilization requirement is imported.

Good cereal production in 2013 in all countries of the subregion except in the CAR

The 2013 aggregate output of cereals is estimated at average to above-average levels in most countries. In the **CAR**, however, the conflict which started in December 2012, severely affected the 2013 agricultural season as large numbers of households could not access their fields due to severe insecurity. Only a small fraction of the displaced households were able to farm limited plots of lands, due to the lack of seeds which were either looted or consumed, and the destruction of agricultural tools and inputs. Consequently, according to a joint FAO/WFP Markets and Food Security Assessment Mission fielded in March 2014, the 2013 agricultural production declined by about 40 percent compared to the previous year, despite favourable rainfall received in most areas during the cropping season. In **Cameroon**, despite some localized losses reported in the cropping areas near the capital Yaoundé due to erratic precipitation, an above-average cereal output was gathered in 2013 due to adequate rainfall over most producing regions.

The subregional cereal production in 2013 is estimated at about 4.9 million tonnes, similar to the 2012 output and 4 percent above the average of the previous five years.

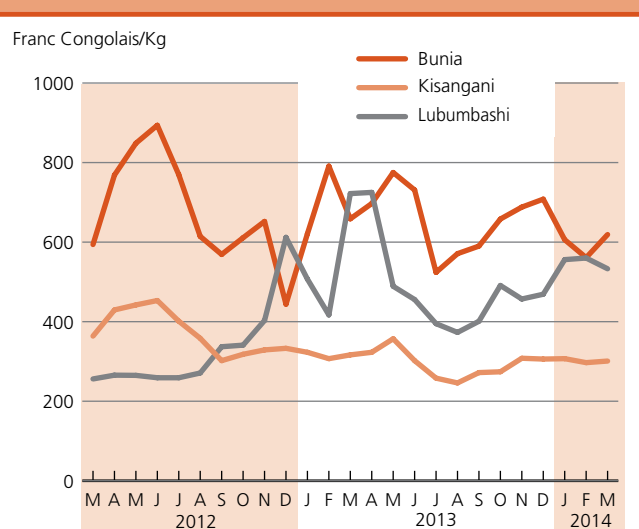
High food prices recorded in the CAR and parts of the DRC

In the **CAR**, according to a market survey fielded by FAO in March 2014, which collected prices of meat, fish and agricultural

commodities in three markets of Bangui and in Bossangoa, in Ouham prefecture, several food commodities were in short supply and sold at very high prices. In Bangui, in March 2014, prices of beef were almost double that of a year earlier and prices of the most consumed types of fish were almost 70 percent higher than 12 months earlier. By contrast,

prices of agricultural commodities showed a marked volatility since the start of the crisis, but are at comparatively low levels: in Bangui, in June 2014 prices of maize and cassava were 19 and 29 percent lower than 12 months earlier, respectively. The low prices of agricultural commodities are the result of a sharp decrease in production coupled with a serious decline in demand, as households partially shifted from market purchases to consuming own production, as their purchasing power was constrained by the loss of livelihoods, reduced employment opportunities and availability of cash. Food aid distributions exerted additional downward pressure on prices.

In the **DRC**, prices of cereals have remained generally high and volatile since late 2012 in conflict-affected eastern and southern areas. In March 2014, prices of maize increased by 10 percent in Bunia, in the eastern Ituri province, following seasonal patterns, while they declined by 5 percent in Lubumbashi, in the southern Katanga province, as the 2014 main harvest, completed in

Figure 5. Democratic Republic of the Congo, maize retail prices

Source: FAO and DRC Ministry of Agriculture.

February 2014, increased supplies. However, in these markets maize prices in March 2014 were still about 60 percent higher than in Kisangani, Mbandaka, Bandudu and Zongo markets, located in non-conflict areas of the country.

In **Gabon**, prices of imported wheat, the most important staple, declined between April and November 2013 following the Government's decision in May 2013 to expand the number of food commodities that are subject to price control from 66 to 166, including wheat flour. However, the removal of price control measures in January 2014 resulted in price increases and between January and March 2014, with wheat prices rising by 25 percent, thus reverting to their high levels of early 2013.

Serious civil and food insecurity situation in the CAR, neighbouring countries affected by large numbers of Central African refugees

Continued civil insecurity in the **CAR** and in parts of the **DRC** has resulted in massive population displacements and hindered access to food for the affected population. In addition, large numbers of refugees from the CAR sought refuge in neighbouring Cameroon and DRC, putting strain on the already limited resources of the hosting communities.

In the **CAR**, the socio-political crisis, which is affecting the entire population, territory and economy, has resulted in widespread disruption in agricultural and marketing activities and caused massive displacements (in late June 2014 the IDP caseload was estimated at 536 500), thus having a severe negative impact on both food availability and access. As a result, the food security situation, which has been sharply deteriorating since the start of the crisis, is alarming. According to an assessment conducted by the FAO-supported Integrated Food Security Phase Classification in April 2014, about 1.7 million people (out of a total population of 4.6 million), are currently in need of urgent assistance, with 57 percent assessed to be in Integrated Phase Classification (IPC) Phase 3: "Crisis" and 43 percent in IPC Phase 4: "Humanitarian Emergency". The regions most affected by food insecurity (Phase 4: "Humanitarian Emergency") are Ouham and Ouham Pende provinces in the north-west.

In the **DRC**, according to the latest available IPC food security analysis, conducted in December 2013 and valid until June 2014, the number of people in acute food insecurity and livelihood crisis (IPC Phase 3 and Phase 4) was estimated at about 6.7 million as of December 2013. As of May 2014, the total number of IDPs was estimated at more than 2.6 million.

In addition, the DRC has received about 60 000 refugees from the CAR since early 2013 and about 130 000 forced returnees expelled from the Republic of Congo.

In **Cameroon**, the arrival of large numbers of refugees fleeing from neighbouring Nigeria and the CAR, has put local food supplies under increased strain. As of late June 2014, the number of refugees from the CAR which sought refuge in Cameroon's East, Adamaoua and North regions, after a surge in sectarian violence in December 2013 was estimated at about 104 000. The number of refugees from Nigeria, which entered Cameroon's Far North region following the serious deterioration of the security situation in June 2013, was estimated at about 5 300 in April 2014.

Eastern Africa

Mixed production prospects for the 2014 main season crops

In Eastern Africa, harvesting of the 2014 main season cereal crops has started or is about to start in southern parts of the subregion, including Burundi, Rwanda, Kenya, Somalia, the United Republic of Tanzania and Uganda, while in northern parts, including Eritrea, Ethiopia and the Sudan crops are at varying stages of development.

In **Somalia** and **Kenya**, cereal production is forecast at average to below-average levels as yields have been affected by a late onset of the rainy season and a prolonged dry spell in April. As rains resumed in May in both countries, some replanting has taken place and harvesting, normally scheduled to start in August, is likely to be delayed. In particular, the 2014 "gu" season output in southern and central Somalia is likely to be significantly reduced as a consequence of the renewed conflict, which temporarily displaced many farmers, hampering planting operations.

In northern and central bi-modal rainfall areas of the **United Republic of Tanzania**, harvesting of 2014 first season "masika" crops is expected to start in July and below-average yields are expected in some areas of Dodoma, Mwanza and Mara regions, where the rainy season was characterized by a late onset and erratic distribution.

Table 10. Eastern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			Change: 2014/2013 (%)
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	
Eastern Africa	4.5	4.8	4.8	37.9	35.9	37.5	44.8	43.4	45.2	4.0
Ethiopia	3.5	4.0	4.0	17.4	19.5	19.5	21.1	23.6	23.6	0.0
Kenya	0.4	0.3	0.3	3.9	3.7	3.4	4.5	4.1	3.8	-8.1
Sudan ²	0.3	0.2	0.3	5.7	2.6	4.7	5.9	2.9	5.1	74.2
Tanzania U.R.	0.1	0.1	0.1	6.2	5.9	5.9	8.0	8.0	8.1	1.1
Uganda	0.0	0.0	0.0	3.3	2.9	2.8	3.5	3.1	3.0	-4.5

Note: Totals and percentage change computed from unrounded data.

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

² Including South Sudan.

In the Karamoja region of **Uganda**, despite abundant rains at the beginning of May, significant water deficits remain in agro-pastoral areas of Kotido and Kaabong districts, with a negative impact on germinating long-cycle crops, to be harvested around November 2014. In the southern/central uni-modal rainfall areas ("msimu") of the United Republic of Tanzania and in bi-modal rainfall areas of Uganda, the 2014 main season is more advanced. In both countries, harvesting is underway and production prospects are generally favourable, except in some areas around Lake Victoria which received below average cumulative rainfall amounts.

In **Rwanda** and **Burundi**, harvesting of the 2014B season crops, representing about 50 percent of annual production is almost complete and crop production is forecast at below-average levels. After a positive start of the rainy season in February, rains have been generally erratic and below average, with an early cessation by mid-April, about one month earlier than usual, with negative effects on critical grain filling stage.

In **South Sudan**, seasonal rains started on time at the beginning of March, favouring land preparation and planting activities of the 2014 first season crops to be harvested by August in bi-modal rainfall areas of the Greenbelt in Central and Western Equatoria. In northern uni-modal rainfall areas of South Sudan and in main cropping areas of the Sudan, planting of the 2014 main season crops (to be harvested between October and January) has started. Significant disruption to planting and cultivation activities are reported in all conflict-affected areas of both countries, particularly in Upper Nile, Unity and Jonglei states in South Sudan and in South Kordofan, Blue Nile as well as North and South Darfur states in the Sudan. Localized floods in May have been reported in South Sudan as well as in coastal areas of southern Somalia, Kenya and the United Republic of Tanzania.

In **Ethiopia**, the main "meher" cropping season has also started in almost all parts of the country, while at the same time harvesting of the 2014 short "belg" season crops has started and production is forecast at average levels, with the exception of Bale and Guji lowlands in Oromia region as well as southern **SNNP region** that received below-average cumulative rains. Normally, the "belg" season crops are harvested from June to August and account for some 10 to 15 percent of total grain production, but in some areas it provides the main harvest. The current outlook of crops in key "meher" producing areas of western Oromia, Amhara and Benishangul Gumuz regions is good following timely and abundant rains since March. The harvest will start in October and production prospects are generally favourable as June-to-September "kiremt" rains are forecast at average to above-average levels.

In most pastoral and agro-pastoral areas of the subregion, severe dry weather conditions prevailed in April and May.

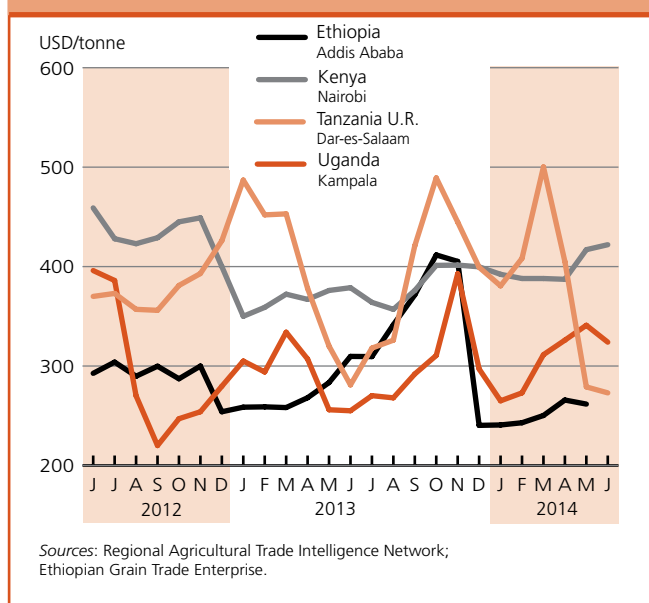
Although rains resumed in May, the analysis of the latest available satellite images showed negative NDVI anomalies in the **Kenyan** provinces of Eastern, Northeastern and parts of the Rift Valley, southeastern and northern pastoral areas of **Ethiopia** (mainly Somali and Afar regions), parts of **Djibouti**, southeastern **South Sudan** (Eastern Equatoria State), southern and central **Somalia**, northern bi-modal areas of the **United Republic of Tanzania** and most of Karamoja region in **Uganda**. In these areas, livestock have generally not yet fully returned from the dry season grazing areas, with negative consequences on milk availability for most households. The current below-average rangeland conditions are expected to lead to a rapid deterioration of pasture and water availability during the June to September dry season, with consequent deterioration of livestock body conditions and productivity.

Coarse grains prices seasonally increasing in most countries

Prices of coarse grains have been increasing in most countries of the subregion since early 2014, as the lean season progressed, and supplies from previous harvests began to draw down.

In **Kenya**, maize prices continued to increase in May in most markets following seasonal patterns compounded by a below-average "short-rains" production, with crops harvested in February. Between February and May, maize prices increased in Nakuru and Eldoret markets by about 19 percent, while in Nairobi they went up by 8 percent. A significant flow of imports from neighbouring Uganda and the United Republic of Tanzania have most likely prevented maize prices increasing further.

Figure 6. Maize prices in selected Eastern African markets



In **Uganda**, wholesale prices of maize increased substantially since the beginning of the year in most markets with the progress of the lean season. In particular, maize prices increased between January and May by 29 percent in the capital Kampala, pushed up by the high export demand from Kenya and institutional purchases.

In **Ethiopia**, wholesale prices of the main increased seasonally from February to May by 7-9 percent in most markets, but they were still around their levels of 12 months earlier due to ample availabilities from the bumper 2013 main "meher" harvest. Similarly, in the capital Addis Ababa, prices of wheat and red sorghum increased over the same period by 18-20 percent, while prices of white sorghum were relatively stable and prices of teff declined by 9 percent.

In **Somalia**, prices of locally-produced sorghum and maize increased in key markets of the south and in the capital Mogadishu between March and May by up to 50 and 40 percent, respectively. Seasonal patterns were reinforced by the reduced availabilities from the below-average 2013/14 "deyr" cereal output, harvested last January, and by serious disruptions in marketing and trade activities caused by the recently-intensified conflict in southern and central regions. As a result, May prices of maize and sorghum were more than double compared to their year earlier values in several markets. The scaling back of humanitarian assistance operations had also exerted some upward pressure.

In **the Sudan**, prices of domestically-produced sorghum and millet have steadily increased since May/June 2013 to record levels, mainly in response to the reduced seasonal harvests. Prices of wheat, largely imported, have also increased and, after a temporary decline in March during the harvest period, the upward trend resumed in April and May, supported by strong local demand, high prices of other cereals and the devaluation of the domestic currency.

In **South Sudan**, in markets located in areas not affected by the ongoing conflict, such as Central Equatoria, Western Bahr el Ghazal and Warrap states, prices of white sorghum were generally stable in March and April, as the availability of imports from neighbouring countries and remaining stocks from recent harvests of the long-cycle crops stabilized prices. By contrast, in the conflict-affected Unity, Upper Nile and Jonglei states, markets and trade flows have been severely disrupted.

In **Rwanda**, prices of maize increased by 8 percent in May despite the imminent start of the B season harvest, partly due to concerns over the crop performance.

In the **United Republic of Tanzania**, cereal prices reached record levels in the first quarter of 2014 and subsequently declined from March to May with the start of the 2014 "msimu" season harvest, almost halving in Dar Es Salaam and decreasing by 25 percent in Arusha.

Serious food situation in parts due to escalation of conflict and displacements

Food security conditions have dramatically worsened during the last months in conflict-affected areas of South Sudan and the Sudan. The situation is expected to deteriorate further as the lean season deepens until August/September, when green crops will start to be available for household consumption. In both countries, civil insecurity and conflict have caused large population displacements, disruption of local livelihoods and reduced income opportunities, losses of assets and food stocks, malfunctioning of markets that resulted in high food prices, and difficulties in delivery humanitarian aid.

In **South Sudan**, according to the latest IPC analysis, about 3.5 million people were assessed to be severely food insecure and are mostly concentrated in the three states of Upper Nile, Jonglei and Unity, where between 50 and 85 percent of the local population is in need of urgent action to protect and save lives and livelihoods. Given the current situation, with about 1.1 million people internally displaced, the timing and scale of the humanitarian response during the coming months will be crucial in order to prevent the crisis deteriorating into a catastrophe by the end of the year.

In **the Sudan**, the number of severely food-insecure people increased between January and June from 3.3 to 5 million, mainly located in conflict-affected areas of Darfur (especially long-term IDPs), South Kordofan and Blue Nile states. The most vulnerable households in drought-prone areas of Red Sea, Kassala, White Nile and North Kordofan states are also expected to face a long and harsh lean season as stocks from last year's poor harvest were already depleted by March, one month earlier than usual.

In **Somalia**, the number of people in need of humanitarian assistance is estimated at about 870 000, including over 200 000 children under the age of five. As the lean season deepens until the next "gu" harvest, food security conditions are expected to deteriorate further due to depleting stocks and increasing prices of the main staple crops. In addition, the renewed conflict in south/central areas has caused large displacement, disruption of trade flows and limited access to humanitarian assistance.

Currently, the number of people in need of humanitarian assistance in the subregion is estimated at about 13.3 million (including 5 million in the Sudan, 3.5 million in South Sudan, 2.4 million in Ethiopia, 1.3 million in Kenya, 870 000 in Somalia, 100 000 in Karamoja region of Uganda and 120 000 in Djibouti), up by 21 percent compared to the March 2014 estimate of 11 million people. Since the start of the conflict in South Sudan, about 380 000 people have fled to Ethiopia, Kenya, the Sudan and Uganda and are in need of humanitarian assistance.

Southern Africa

Cereal production estimated to increase significantly in 2014 over last year's reduced output

Harvesting of the 2014 main season coarse grains is expected to conclude in July, while the winter wheat crop, mainly grown in South Africa and Zambia, will be harvested from October. Overall, robust production gains are expected in all countries of the subregion, with significant increases estimated in South Africa, Zimbabwe and Zambia, compared to last year's drought-reduced outputs. Favourable climatic conditions and continued public support, to improve input supplies, largely account for the positive outlook this year, with maize production estimated to increase by 17 percent to 26.5 million tonnes in the subregion.

South Africa is estimated to harvest an aggregate maize crop of about 14.1 million tonnes, following a strong 33 percent production rebound for the commercial white maize crop. Most of the production gain is attributed to increased yields, about 12 percent up on the average of the previous five years, and only a 4 percent increase in the area planted. **Malawi** and **Zambia**, which together contribute to about one-quarter of the subregion's maize output, have both gathered larger harvests this year, with a record maize harvest of 3.35 million tonnes expected in Zambia and a bumper 3.9 million tonnes crop estimated in Malawi. Favourable weather conditions and continued input support, as well as the re-engagement of the commercial sector in Zambia, accounted for the estimated increases. After a substantially drought-reduced harvest in 2013, **Zimbabwe's** cereal output is estimated to have nearly doubled in 2014, following beneficial rains throughout the growing season. Similarly, in **Namibia**, although production is relatively small, the cereal output is estimated to have increased by about 50 percent

to 122 000 tonnes, compared to the sharply-reduced harvest in 2013. However, the increase is mainly from the commercial farming sector and the overall cereal harvest still remains 5 percent below the short-term average, with production losses reported in northcentral communal farming zones.

A smaller year-on-year increase of about 20 percent to 1.25 million tonnes is estimated in **Angola**, with production losses expected in southern coastal areas, due a dry spell in the first quarter of 2014. A second consecutive annual production increase is estimated in **Mozambique**, while in **Swaziland** and **Botswana** favourable weather during the cropping season resulted in production gains. **Lesotho** recorded a large increase in the area cultivated, however, low yields, partly on account of late plantings and frost damage to the sorghum crop, dampened production, which is estimated at a slightly lower level to last year.

In **Madagascar**, the rice harvest is expected to return to near-average levels following last year's locust and erratic weather damage. Treatment and prevention measures against locusts reduced potential damage and relatively stable weather assisted crop growth this year. Approximately 1 million hectares have been treated by a joint Government/FAO anti-locust operation since September 2013. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) is currently underway and is expected to provide more details on the national supply outlook in 2014/15.

Reduced import requirements forecast in 2014/15

The subregion's aggregate maize import requirement in the 2014/15 marketing year (generally May/April) is expected to significantly decline compared to the 1.45 million tonnes imported in 2013/14. This mainly reflects the improved domestic harvest in Zimbabwe, the subregion's largest importer. South

Table 11. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Southern Africa	2.2	2.3	2.0	24.1	23.9	28.0	5.1	4.2	4.8	31.4	30.3	34.8	14.8
- excl. South Africa	0.3	0.4	0.3	10.8	10.9	13.2	5.1	4.2	4.8	16.2	15.5	18.4	18.7
Madagascar	0.0	0.0	0.0	0.4	0.5	0.4	4.6	3.6	4.3	5.0	4.1	4.7	15.6
Malawi	0.0	0.0	0.0	3.7	3.8	4.0	0.1	0.1	0.1	3.8	3.9	4.1	5.4
Mozambique	0.0	0.0	0.0	1.8	1.8	2.2	0.3	0.4	0.3	2.2	2.2	2.5	13.3
South Africa	1.9	1.9	1.7	13.3	13.0	14.7	0.0	0.0	0.0	15.2	14.9	16.4	10.6
Zambia	0.3	0.3	0.2	2.9	2.6	3.4	0.0	0.0	0.0	3.2	2.9	3.6	24.5
Zimbabwe	0.0	0.0	0.0	1.1	1.0	1.7	0.0	0.0	0.0	1.2	1.0	1.7	77.0

Note: Totals and percentage change computed from unrounded data.

Africa is expected to continue to remain as the dominant exporter, particularly given its large maize output this year and comparatively lower prices. Zambia is likely to retain its position as the second largest exporter, following the lifting of the export ban, with an exportable surplus of about 1 million tonnes. Overall, current trade prospects for maize remain favourable for the import dependent countries of the subregion.

Imports of wheat and rice, of which the subregion is a deficit producer, are estimated to remain comparatively stable in 2014/15. Rice imports in Madagascar, which increased sharply in the previous marketing year, as the country sought to compensate for the 2013 production shortfall, are estimated to decline, due to the expectation of a larger rice output in 2014. Aggregate wheat and rice import-requirements for the subregion are forecast at 3.6 and 2.8 million tonnes respectively.

Maize prices declined sharply, reflecting estimated bumper harvests

Prices of maize began to decline in April, with significant decreases recorded in some countries, including South Africa, as the 2014 harvest nears completion. This follows generally large gains in the preceding marketing year, as reduced national harvests and export demand applied strong upward price pressure.

Prices in **South Africa**, the subregion's main exporter, declined sharply since their record levels of February 2014. Buoyed by the positive supply outlook in 2014/15, prices came under strong downward pressure in April and May, and in June dipped below ZAR 2 000 per tonne for the first time in two years. At this level, prices of white and yellow maize were about 19 and 25 percent below their year-earlier quotations. In addition to the easing of domestic supply constraints, lower international prices have further underpinned the recent decreases. The lower prices in South Africa are expected to exert downward pressure on import prices in **Lesotho, Swaziland, Botswana** and **Namibia**, which source a large quantity of their cereal needs from South Africa.

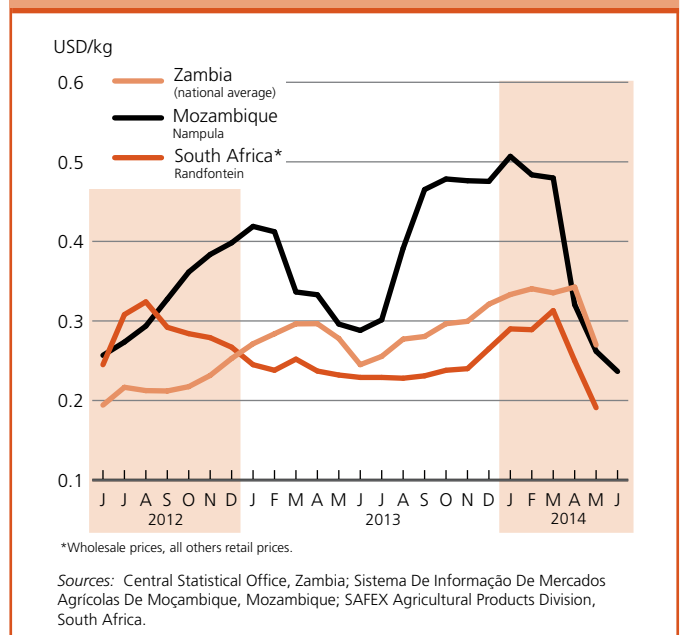
Prices of maize in **Mozambique** are generally below their year-earlier levels, however, in **Malawi** and **Zambia**, despite recent decreases due to the estimated larger 2014 harvests, prices still remain above the previous year's levels. Significant increases in 2013 and the start of 2014, due to a combination of regional production shortfalls, the removal of subsidies and the depreciation of the national currency, added inflationary pressure

and have helped maintain the higher year-on-year prices. In **Madagascar**, rice prices have been on a downward trajectory since the beginning of 2014, as expectations of a rebound in national production and ample volumes of imports have eased supply constraints and exerted downward price pressure.

Improved food security conditions expected in 2014/15

Overall food security conditions are expected to recover significantly this year, following a tight situation in 2013/14 that was largely attributed to lower national harvests and increasing maize prices. In the immediate period, as households' supplies increase with the current 2014 harvest and prices decline, food access and availability are anticipated to improve. However, conditions are expected to deteriorate in parts of the southern provinces of **Angola** and northcentral areas of **Namibia** from August/September, as a result of reduced cereal harvests this year. The release of the national vulnerability assessments from July onwards will provide more detailed information on the current food security situation and required interventions required.

Figure 7. White maize prices in selected Southern African markets



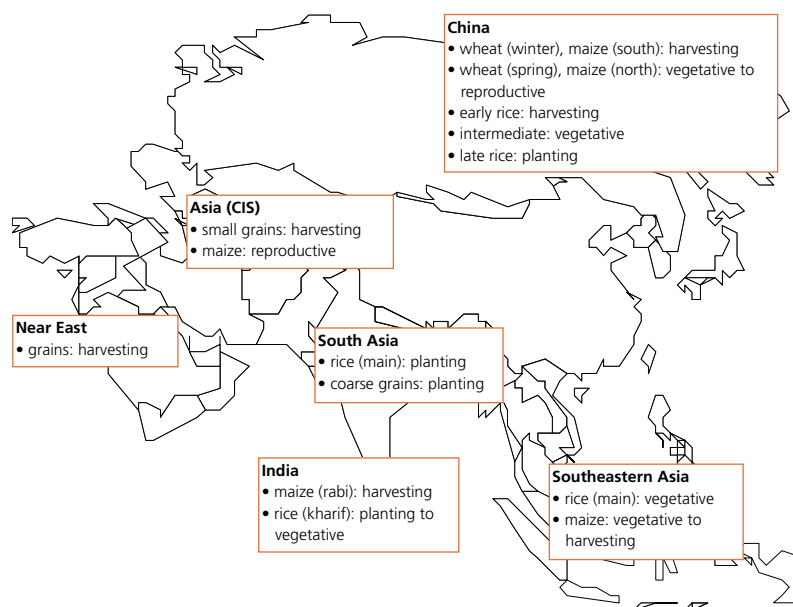
Asia

Far East

Wheat production in 2014 estimated at a record level

Harvesting of winter crops, including mostly irrigated wheat and barley, is nearing completion in the Far East. FAO's latest estimates put the subregion's aggregate 2014 wheat harvest at a record level of 248.2 million tonnes, an improvement of 2 percent over the 2013 bumper output. The overall increase in production is a result of generally favourable weather conditions during the growing period from November 2013 to April 2014, with adequate water supplies for irrigation and good availability of agricultural inputs. Record wheat harvests were officially estimated in **China** and **India** at 122.5 and 95.9 million tonnes, respectively, mainly reflecting adequate growing conditions and generally high domestic prices. Similarly, favourable weather conditions boosted wheat production to record levels in **Bangladesh, Mongolia** and **Nepal**.

In **Pakistan**, excessive rains in May in northern growing areas reduced yields and led to a slight downward revision of the previous production forecast. As a result, FAO's latest estimate points to a total 2014 wheat output of 25 million tonnes, slightly above last year's flood-affected crop and the second best on record. Despite a small increase in plantings in **Japan**, below-average rains and



Note: Comments refer to situation as of July.

lower availability of water supplies during the season in parts of the country resulted in a slight decline in yields and consequently wheat production. In the **Democratic People's Republic of Korea**, this year's wheat crop is estimated to increase from the previous year, mainly as a result of a small expansion in plantings.

Favourable prospects for the 2014 first season rice crop in most countries

Harvesting of the 2013/14 secondary rice crop in most countries of the subregion and the 2014 main rice crop in the southern

Table 12. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Far East	243.9	244.4	248.2	309.8	324.1	324.5	662.3	671.8	678.2	1 216.1	1 240.3	1 250.8	0.8
Bangladesh	1.3	1.4	1.4	2.3	2.3	2.3	50.8	51.5	52.0	54.3	55.2	55.7	1.0
Cambodia	0.0	0.0	0.0	1.0	0.9	1.0	9.3	9.4	9.5	10.2	10.3	10.5	1.8
China	120.8	121.9	122.5	214.7	227.2	228.3	205.9	205.0	209.2	541.5	554.2	560.0	1.1
India	94.9	93.5	95.9	41.6	43.0	40.8	157.9	159.4	160.5	294.4	296.0	297.2	0.4
Indonesia	0.0	0.0	0.0	19.4	18.5	19.1	69.1	71.3	72.0	88.4	89.8	91.1	1.5
Japan	0.9	0.8	0.8	0.2	0.2	0.2	10.7	10.8	10.6	11.7	11.8	11.6	-1.6
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.4	5.7	5.7	5.6	6.0	6.0	0.7
Myanmar	0.2	0.2	0.2	1.7	1.9	1.9	27.7	28.8	29.5	29.6	30.8	31.6	2.5
Nepal	1.8	1.9	1.9	2.3	2.6	2.8	4.5	5.0	4.8	8.7	9.6	9.5	-0.7
Pakistan	23.5	24.2	25.0	5.2	5.3	5.4	8.3	10.2	10.4	37.0	39.7	40.8	2.7
Philippines	0.0	0.0	0.0	7.4	7.4	7.6	18.1	18.8	19.3	25.5	26.1	26.9	3.0
Thailand	0.0	0.0	0.0	5.1	5.2	5.3	38.0	38.2	37.5	43.1	43.5	42.8	-1.6
Viet Nam	0.0	0.0	0.0	4.8	5.2	5.4	43.7	44.1	44.2	48.5	49.3	49.6	0.7

Note: Totals and percentage change computed from unrounded data.

Table 13. Far East cereal production and anticipated trade in 2014/15¹
(thousand tonnes)

	Avg 5-yr (2009/10 to 2013/14)	2013/14	2014/15	2014/15 over 2013/14 (%)	2014/15 over 5-yr avg (%)
Cereals - Exports	38 751	46 035	42 364	-8.0	9.3
Cereals - Imports	91 022	104 090	101 625	-2.4	11.6
Cereals - Production	957 336	1 016 666	1 025 088	0.8	7.1
Rice-milled - Exports	28 656	31 473	31 358	-0.4	9.4
Rice-milled - Imports	9 925	10 183	9 990	-1.9	0.7
Rice-milled - Production	431 656	448 164	452 422	1.0	4.8
Wheat - Exports	4 529	7 590	5 990	-21.1	32.3
Wheat - Imports	35 502	41 516	39 268	-5.4	10.6
Wheat - Production	233 698	244 390	248 210	1.6	6.2

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

at 1 251 million tonnes (including rice in paddy terms), slightly above the record level of 2013. Accounting for 54 percent of the total cereal output, the aggregate 2014 annual paddy production for the subregion is tentatively forecast to reach a record level at 678.2 million tonnes, up 1 percent from last year's bumper harvest. The 2014 maize output is projected to remain close to last year's record level. However, given that the bulk of the 2014 paddy and coarse grains crops are currently being planted, the situation could change as the season progresses.

countries, namely, Indonesia, Sri Lanka, Timor-Leste and Viet Nam, are almost complete. Overall, beneficial weather, ample supplies of irrigation water, seeds, fertilizers and other inputs boosted production this season, especially in **Bangladesh, Cambodia, India** and **Viet Nam**. In particular, in **the Philippines** the secondary season rice output is officially estimated at a record level of 8.4 million tonnes. Higher yields, following above-average rainfall during the growing season, and a slight expansion in plantings, as farmers replanted fields damaged by Typhoon Haiyan in November account for the increase. By contrast, in **Thailand**, the 2013/14 secondary season rice production is expected to decline by 5 percent from last year's record level to 10.2 million tonnes following prolonged dry weather which limited water availabilities for irrigation particularly in the northern and central parts of the country. Similarly, in **Sri Lanka**, prolonged dry weather since the beginning of the season, particularly in the key northern and eastern producing areas, resulted in a reduced main 2014 "maha" season, estimated at 2.4 million tonnes, compared to 2.9 million tonnes of last year.

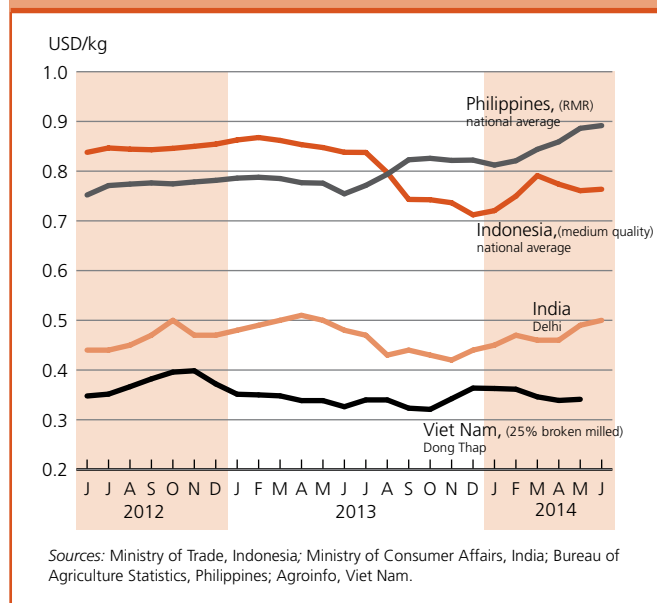
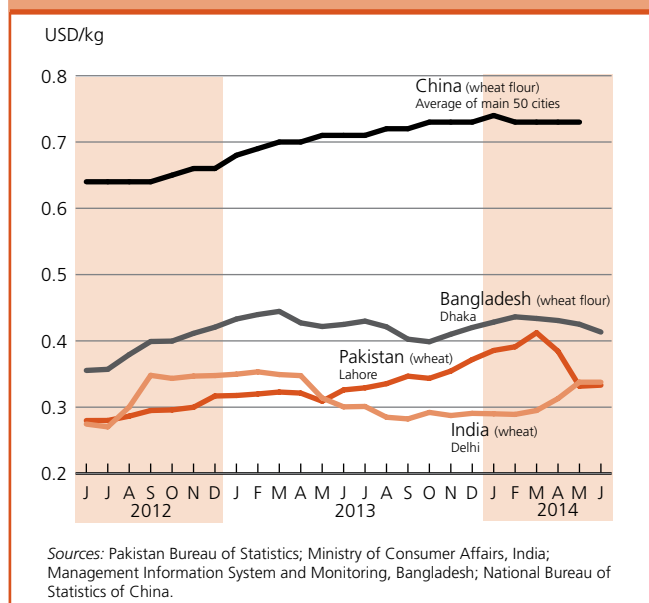
Overall, the 2014 aggregate cereal harvest is forecast to increase slightly from last year's record level

Planting of the 2014 main season rice and coarse grains, to be harvested from September onwards, is currently in full swing. Based on estimates of the already harvested winter crops, and assuming a good monsoon season, FAO tentatively forecasts the 2014 aggregate annual cereal production for the Far East subregion

Cereal trade expected to decrease in the 2014/15 marketing year

Due to the overall anticipated cereal production increase in 2014 in most countries of the subregion, the aggregate cereal imports of the 2014/15 marketing years, are expected to decrease slightly compared to 2013/14, but remain 11.6 percent above the preceding five-year average level. The decrease is mainly attributed to the lower maize and wheat import requirements from **China**, which is forecast to fall by 30 percent to 3.5 million tonnes and 33 percent to 5 million tonnes from last year's level, respectively, given the anticipated record harvest and large carryover stocks. Similarly, the aggregate rice imports are expected to decrease slightly to 10 million tonnes. However, an increase in imports from last year's low level in forecast in **Indonesia**, as well as **Sri Lanka** due to anticipated lower production this year.

Aggregate cereal exports in 2014/15 are preliminarily forecast to decrease by a significant 8 percent from the previous year's record level, primarily because of an almost 20 percent drop in the exportable surplus from **India**. With regard to rice, the subregion's largest exported cereal, exports for 2014 are anticipated to decline slightly from last year's record level. Lower rice exports in India compared to last year, are expected to be partially compensated by an increase in exports from **Thailand**, estimated at 10 million tonnes, an improvement of 11 percent relative to the near-record 2013 performance. In Viet Nam, rice exports are forecast to remain similar to last year's level.

Figure 8. Rice retail prices in selected Far East countries**Figure 9. Wheat and wheat flour retail prices in selected Far East countries**

Prices of rice and wheat remained stable or have begun to fall in recent months

Retail rice prices in local currencies remained mostly stable, or declined in some countries as a result of improved availabilities from the 2013/14 early season harvests. By contrast, prices increased in **Viet Nam**, due to renewed export demand and in **the Philippines**, where they reached record levels, mainly as a result of lower imports in the previous months. Similarly, retail prices of wheat and wheat flour were mostly unchanged or started to decline in some countries, including **Bangladesh**, **India** and **Pakistan**, with the 2014 harvests. Wheat quotations were still higher than a year earlier.

Near East

Wheat production in 2014 forecast to decrease

Harvesting of the 2014 winter wheat and barley crops is almost complete and the early estimates indicate a wheat crop of about 44.6 million tonnes, nearly 8 percent below last year's above-average output.

In **Turkey**, the 2014 wheat crop suffered from drought in the autumn of 2013 followed by cold weather. Spring rains improved soil moisture but first estimates from the Turkish Statistical Institute indicate a 10 percent decrease in cereal production in 2014, compared to last year, to about 33.8 million tonnes. The forecast includes 19.8 million tonnes of wheat (11 percent decrease on last year) and 13.1 million tonnes of coarse grains (also a 10 percent decline). In **Afghanistan**, an above-average wheat harvest of 5.1 million tonnes is forecast to be collected in 2014, about the same as the 2013 harvest which was one of

the highest on record for the last 35 years. The above-average harvest in 2014 is attributed to favourable weather and moisture conditions with better snow accumulation in winter. In the **Islamic Republic of Iran**, the second biggest wheat producer in the sub-region after Turkey, the 2014 production is anticipated to remain unchanged from the five-year average of about 13.5 million tonnes.

By contrast, an above-average wheat production of 3 million tonnes was expected in **Iraq** following favourable weather conditions, but the recent escalation of conflicts is expected to negatively affect the final outcome. In the **Syrian Arab Republic**, current forecasts of about 2 million tonnes of wheat indicate a severe reduction in cereal crop production in 2014 due to the impact of conflict and drought conditions.

The region both exports and imports grain. Wheat import requirements for the 2014/15 marketing year are forecast at 27.7 million tonnes, 13 percent above last year and 20 percent above the five-year average.

Iraq, Yemen and Syria continue to face escalating humanitarian crisis

In **Iraq**, as of 18 June 2014, over 1.1 million people fled Mosul, Anbar, Tikrit and Samara. Additional increases in the numbers of internally displaced are expected. At the moment there are reports of deteriorating access to drinking water. Food security conditions are likely to deteriorate with large number of IDPs putting strain on hosting communities, in particular as a large share of IPDs have fled toward cities in the Kurdish region of Iraq.

In **Yemen**, the food security situation remains highly

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Near East	45.6	48.0	44.5	20.7	23.1	21.0	4.6	4.7	4.8	70.9	75.9	70.3	-7.3
Afghanistan	5.1	5.2	5.1	0.8	0.7	0.7	0.7	0.7	0.7	6.6	6.6	6.5	-0.8
Iran (Islamic Rep. of)	13.8	14.0	13.5	4.7	4.5	4.5	2.8	2.9	3.0	21.3	21.4	20.9	-2.1
Iraq	2.4	3.3	3.0	0.8	1.2	1.2	0.2	0.2	0.2	3.4	4.7	4.4	-6.9
Syrian Arab Republic	2.8	2.4	2.0	1.0	1.1	0.4	0.0	0.0	0.0	3.8	3.5	2.4	-31.0
Turkey	20.1	22.1	19.8	12.4	14.5	13.1	0.9	0.9	0.9	33.4	37.5	33.8	-9.8

Note: Totals and percentage change computed from unrounded data.

critical. According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance, and an additional 5 million people are “moderately” food insecure and at risk of a deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world, with close to half of Yemen’s children under five years: 2 million children are stunted and 1 million are acutely malnourished. To tackle the food insecurity situation, an Emergency Operation (EMOP) was approved by WFP and FAO in January 2014 to provide emergency food and nutrition support to 3.8 million food-insecure and conflict-affected people through food assistance and cash transfers between January and June 2014.

In **the Syrian Arab Republic**, the continued civil unrest which began in March 2011 has raised serious concerns over the state of food security in the country and in the region. As of December 2013, the number of IDPs reached 6.5 million up from 4.25 million in July 2013. Households’ capacity to access food has deteriorated sharply and is expected to deteriorate further, as a result of high levels of unemployment, reduced income generating opportunities, high inflation, depreciation of the local currency, disruptions in the supply chain and an overall contraction in the economy by 18–20 percent between 2012 and 2013. In response, WFP launched a Revised Emergency Operation in January 2014 aimed at providing assistance to an additional 250 000 beneficiaries, bringing the total to 4.25 million beneficiaries in

the country, with a total cost of about USD 915 million. As of mid-June 2014, almost 2.9 million refugees were registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain. WFP assistance in neighbouring countries has been scaled up to reach more than 2.5 million beneficiaries by December 2014, more than three times the 795 000 individuals assisted as of June 2013.

CIS in Asia²

Early prospects for the 2014 cereal production are favourable

Planting of the 2014 spring cereals has been completed, while winter crops are currently being harvested. The 2014 aggregate cereal production, including the winter cereal harvest and the forecast of the spring seasons, is forecast at 33.8 million tonnes, similar to last year’s above-average level.

In **Kazakhstan**, the main-producing country of the subregion,

Table 15. CIS in Asia cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
CIS in Asia	21.4	26.2	26.7	5.1	6.3	6.3	27.3	33.3	33.8	1.3
Armenia	0.2	0.3	0.3	0.2	0.2	0.2	0.4	0.5	0.4	-4.4
Azerbaijan	2.0	2.1	2.0	0.8	0.9	0.9	2.8	2.9	2.9	-3.0
Georgia	0.1	0.1	0.1	0.4	0.4	0.4	0.5	0.5	0.5	-11.0
Kazakhstan	9.8	14.0	14.8	2.2	3.3	3.3	12.4	17.6	18.5	5.0
Kyrgyzstan	0.6	0.8	0.7	0.7	0.8	0.8	1.4	1.6	1.6	-3.1
Tajikistan	0.8	0.8	0.8	0.2	0.3	0.2	1.1	1.1	1.1	1.8
Turkmenistan	1.2	1.4	1.3	0.1	0.1	0.1	1.4	1.6	1.5	-4.5
Uzbekistan	6.7	6.9	6.7	0.4	0.4	0.4	7.3	7.5	7.3	-2.3

Note: Totals and percentage change computed from unrounded data.

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

² Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

the 2014 cereal output is forecast at 18.5 million tonnes, an improvement of 5 percent over the previous year's average level. With regard to the 2014 wheat output, FAO preliminarily forecasts point to a crop of 14.8 million tonnes, up 6 percent from the 2013 below-average harvest. The increase is mainly attributed to slightly higher plantings and anticipated average yields following generally favorable weather conditions in the main-growing areas and adequate supplies of agricultural inputs. Higher production in Kazakhstan, is expected to compensate for the anticipated reduction in cereal outputs in most other countries, including **Azerbaijan**, **Georgia** and **Turkmenistan**, following below-average rains during the growing season, and **Armenia** due to a decrease in plantings.

In **Kyrgyzstan**, prolonged dry weather between early April and mid-June, particularly in the northern-producing areas, is expected to reduce the 2014 cereal output by 3 percent to 1.6 million tonnes.

Import requirements in 2013/14 marketing year are estimated to increase considerably

The countries of the subregion, except **Kazakhstan**, are heavily dependent on cereal imports, mostly wheat. The aggregate cereal imports for the 2013/14 marketing year (July/June), are estimated at 6.8 million tonnes, some 11 percent above last year's low level and 8 percent higher than the preceding five-year average. The increase is mainly attributed to higher wheat import requirements by **Azerbaijan**, which is estimated to increase by 19 percent to 1.5 million tonnes, mainly on account of stock build-up.

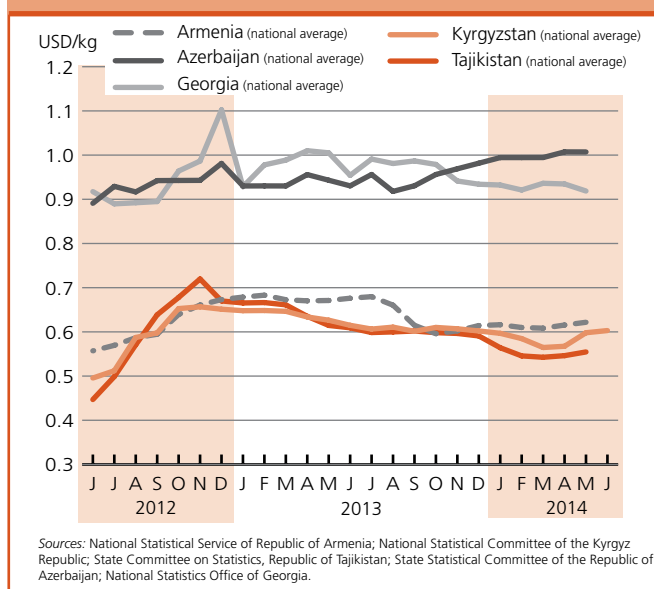
Cereal exports, mostly wheat, in the 2013/14 marketing year, are estimated at 8.8 million tonnes or 16 percent higher than the reduced level of the previous year, primarily because of a 15 percent increase in wheat exports from Kazakhstan estimated at 7.5 million tonnes. The subregion's aggregate cereal exportable surplus in the forthcoming 2014/15 marketing year is forecast to

decrease from the 2013/14 level.

Domestic wheat flour prices stable but those of potatoes at high levels

In the wheat import-dependent countries, prices of wheat products remained relatively unchanged in May. Overall, prices of wheat flour were around their year-earlier levels, except in Tajikistan where quotations were lower following two years of good production coupled with adequate levels of imports from Kazakhstan, the country's main supplier. By contrast, prices of potatoes, another food staple in the subregion, continued the increasing trend of the past months and in May were at record highs in several markets. Seasonal increases were exacerbated by reduced outputs and lower imports in some countries and increased transportation costs.

Figure 10. Retail wheat flour prices in selected CIS in Asia countries



Latin America and the Caribbean

Central America and the Caribbean

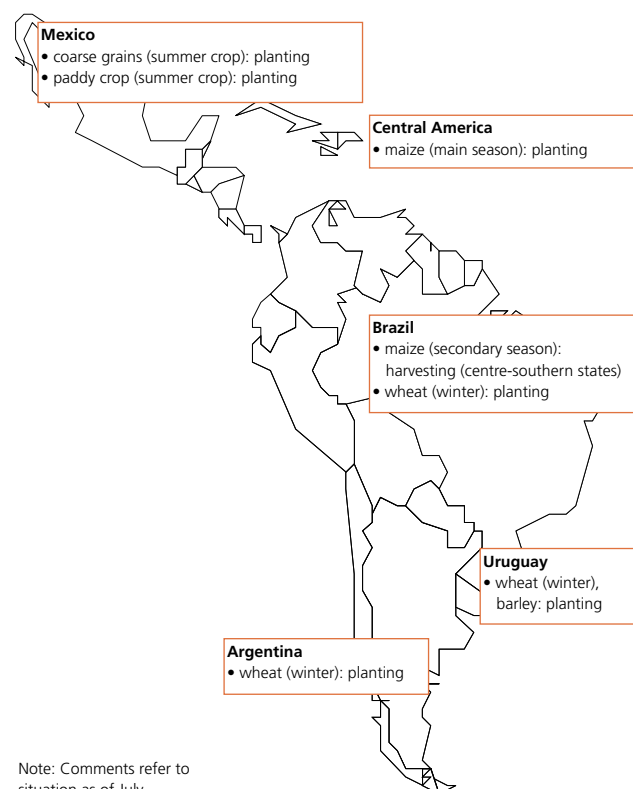
The 2014 wheat production is expected to increase

Harvesting of the 2014 main irrigated winter wheat crop is almost complete in **Mexico**, virtually the only producer in the subregion. Reflecting an increase in the area harvested, initial estimates point to a production of 3.7 million tonnes, up 4 percent from last year and just above the country's five-year average.

Maize production forecast to increase in 2014

Sowing of the main first season 2014 maize crop was concluded in the subregion in June. In **Mexico**, the subregion's main producer, the maize output is forecast to decline slightly from last year's bumper crop due to a reduction in area planted to white maize, driven by low prices. By contrast, plantings of yellow maize are anticipated to increase on account of more favourable prices. However, the aggregate output is still forecast well above the country's five-year average at more than 22 million tonnes. Elsewhere in the subregion, initial forecasts for the aggregate 2014 maize crop (excluding Mexico) point to an increase of 2 percent from last year and 4 percent above the five-year average. The continued growth in production is mainly underpinned by improvements in yields, as countries in the subregion continue to provide access to improved seeds and fertilizers.

In **Nicaragua**, however, there is some uncertainty about the 2014 production as rainfall levels were significantly below historical levels and arrived late in May, when a significant portion of the main first season's maize crop is sown, which might have negatively affected the total area planted. In all of the subregion



there is concern of El Niño conditions setting in, which has previously been associated with reduced rains and may affect the second coarse grains season, starting for from August.

In **Haiti**, early forecasts for the main 2014 coarse grains season are also favourable as rains recovered during the sowing period. Total coarse grains production is initially forecast to increase 4 percent from last year, putting the 2014 output close to the country's five-year average. However, this forecast is heavily dependent on this year's hurricane season and continued good distribution of rainfall.

Table 16. Latin America and Caribbean cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Central America & Caribbean	3.3	3.5	3.7	34.8	35.4	35.3	2.7	2.9	3.0	40.9	41.8	41.9	0.3
El Salvador	0.0	0.0	0.0	1.1	1.1	1.1	0.0	0.0	0.0	1.1	1.1	1.1	0.4
Guatemala	0.0	0.0	0.0	1.7	1.8	1.8	0.0	0.0	0.0	1.8	1.8	1.8	0.9
Honduras	0.0	0.0	0.0	0.6	0.6	0.6	0.1	0.1	0.1	0.7	0.7	0.7	3.2
Mexico	3.3	3.5	3.7	30.2	30.5	30.3	0.2	0.2	0.2	33.6	34.2	34.2	0.0
Nicaragua	0.0	0.0	0.0	0.5	0.6	0.6	0.4	0.5	0.5	1.0	1.0	1.1	5.9
South America	16.5	19.1	23.8	121.5	137.7	129.4	24.8	25.3	25.6	162.8	182.1	178.8	-1.8
Argentina	8.2	9.2	11.5	31.2	37.8	35.7	1.6	1.6	1.6	41.0	48.6	48.8	0.5
Brazil	4.4	5.7	7.8	74.1	83.5	79.0	11.6	11.8	12.3	90.1	101.1	99.0	-2.0

Note: Totals and percentage change computed from unrounded data.

Cereal imports to increase in 2013/14

Estimates of cereal imports, for the recently-concluded 2013/14 marketing year (July/June), have been revised slightly downward compared with earlier forecasts. However, imports are still estimated to have increased by 19 percent from 2012/13 to 27 million tonnes, well above the subregion's five-year average. The increase is driven by strong demand for yellow maize from the feed industry, particularly in **Mexico**, **El Salvador** and **Panama**. Initial forecasts for the 2014/15 marketing year point to a slight contraction import requirements, but it still remains well above the subregion's five-year average. The decline is mainly driven by an expectation of reduced requirements in Mexico, as it is foreseen that their output of yellow maize will increase in 2014.

Cereal prices increased seasonally but remain below their levels of a year earlier, while bean prices continued to surge

Prices of white maize, the main staple in the subregion, continued to increase at moderate rates following seasonal trends and remained around or below their values of a year earlier, reflecting adequate supplies from the good 2013 harvests. An exception to this trend is **Nicaragua**, where prices surged by over one-quarter in May supported by uncertainty about the recently planted main 2014 maize crop, due to delayed and below-average precipitation. However, prices were still significantly lower than in May 2013. In **Mexico**, prices persisted at relatively low levels following successive years of satisfactory harvests.

In **Haiti**, prices of imported rice, the main staple, remained unchanged in May and at the same level as a year earlier in key markets. This mirrors stable rice export quotations over the past months in the United States, the country's main supplier. Prices of maize meal, another important staple, have also been stable and substantially below their levels in May last year following the recovery of the 2013 maize production and improved prospects for this year's production.

Prices of red beans, the variety most consumed in **Nicaragua**, **Honduras** and **El Salvador**, have been on the increase since February this year. In May, prices rose by one-quarter from April and were three times higher than a year earlier reaching record levels in some markets. Reduced production and low export availabilities in the subregion have underpinned the high prices. In Nicaragua, the main producer and exporter of the subregion, the 2013 red bean output declined by 11 percent from the previous year following diversion of land to black beans, mainly in response to higher import demand from Venezuela. In Honduras, the second producer and exporter, the 2013 bean production was sharply reduced by excessive rains during the main "de postre" season, falling by an estimated 15 percent compared to the same season's output in the previous year. Higher import demand from **Costa Rica**, which has switched imports from China, its main supplier until 2012, to Nicaragua has added pressure on red bean prices.

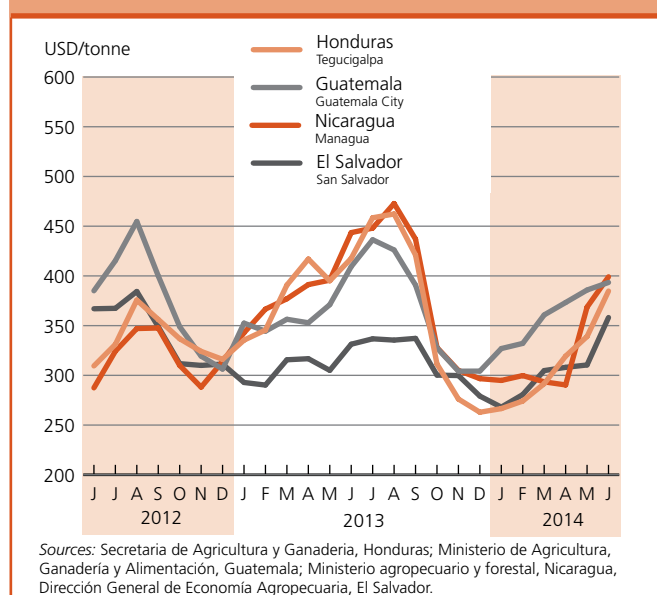
South America

Coarse grain production in 2014 is anticipated to remain at high levels

In the main producing countries of South America, harvesting of the 2014 main season coarse grains and rice crops is about to finish and prospects are generally favourable. Preliminary forecasts for the 2014 maize output point to an 7 percent decline from last year's record level, but the total output is anticipated well above the five-year average and expected to reach 115 million tonnes. The decline is mainly driven by lower maize plantings for the second season in **Brazil** and reduced yields in **Argentina**. In **Ecuador**, initial forecasts point to continued growth in 2014 maize production due to high local demand and continued Government trade policies that limit imports and also provide support to prices. In **Peru**, while initial forecasts also point to an increase in production, some uncertainty remains as dry weather early in the season might have affected yields in key-producing regions.

The aggregate subregional rice production is forecast to increase by 1 percent and remain above the five-year average, mainly due to good weather conditions and improved yields. The exception is Peru, where low levels of irrigation water supplies negatively affected yields. Early estimates point to a decline of almost 8 percent to 2.8 million tonnes of rice (paddy), just below the country's five-year average.

Figure 11. Wholesale white maize prices in selected countries in Central America



Favourable prospects for the 2014 wheat crop

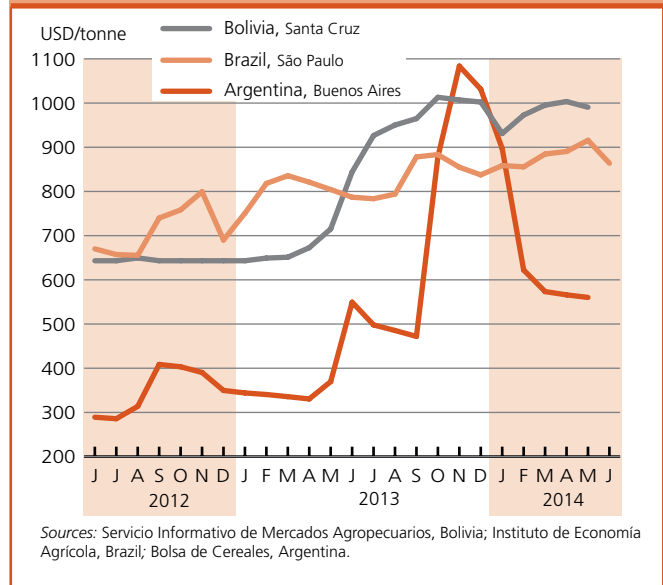
Following an increase in the area planted and satisfactory weather conditions so far, the preliminary outlook for the 2014 wheat crop, to be harvested towards the end of the year, are favourable. The increase in sowings, particularly in **Argentina** and **Brazil**, is underpinned by strong regional demand and high prices. The subregion's aggregate production is expected to recover from the low levels of the previous two years and reach almost 24 million tonnes, above the five-year average.

Wheat flour prices generally stable, but still at high levels, while maize prices started to decline

Domestic wheat flour prices in the subregion remained generally stable in May and were markedly lower than the near-record highs of previous months in southern countries of the subregion. Increased flows of regional trade, coupled with favourable planting prospects for the 2014 wheat crop in **Argentina**, the region's main producer and exporter, and in **Brazil** contributed to the price stability. However, prices were still considerably above their levels of a year earlier due to tight supplies following two consecutive reduced subregional outputs. Elsewhere in the subregion, wheat flour prices remained unchanged and at relatively low levels in **Ecuador** and **Peru**.

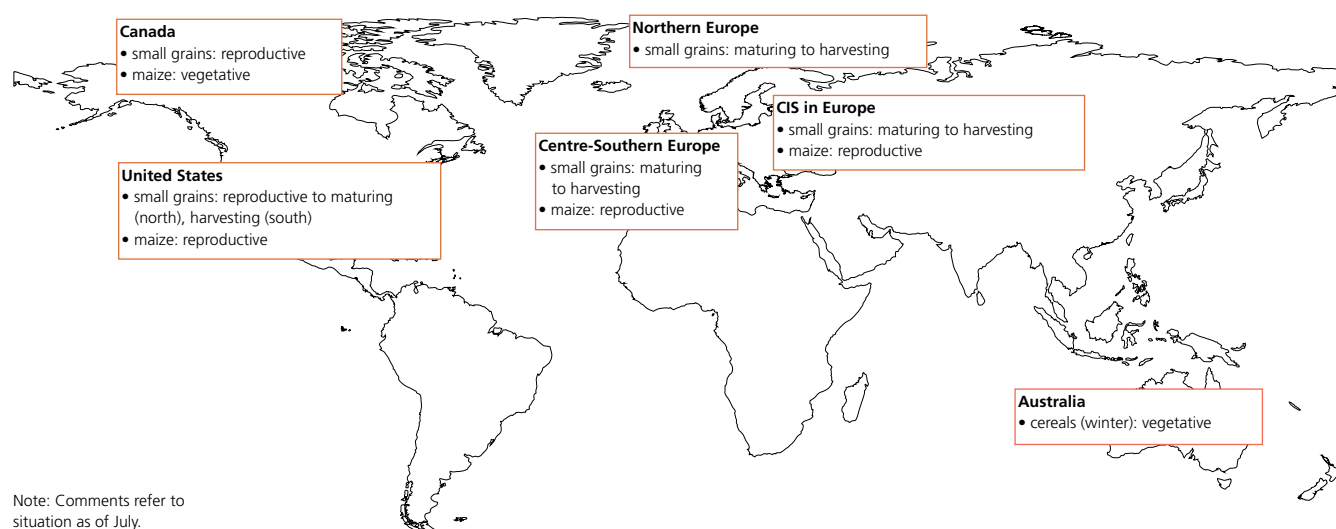
Yellow maize prices declined in May in most countries with the 2014 harvests and favourable crop prospects, particularly in **Argentina** and **Brazil**. In **Ecuador**, prices declined sharply in May, after increasing since the beginning of the year, to levels well below those of a year earlier. In **Bolivia** and **Colombia**, prices

Figure 12. Wholesale wheat flour prices in selected countries in South America



were mostly unchanged in May and relatively low. By contrast, in **Peru** maize prices continued to strengthen as prospects for this year's crop are uncertain in some key-growing northern areas. Lower imports of maize in the past months also supported prices. Prices of rice, a key staple in some countries of the subregion, remained stable in May and generally lower than a year earlier. However, in Peru, rice prices were over one-third higher than in May 2013, after the sharp increase in previous months, due to unfavourable prospects for the 2014 crop.

North America, Europe and Oceania



North America

Mixed conditions for wheat in United States, but maize crop developing normally

In the **United States**, harvesting of the winter wheat crop is well underway in the southern Great Plains where yields are turning out well below normal following a severe drought throughout the growing period. Although conditions have been mostly satisfactory for crops in the northern Plains and other parts, the official June forecast puts the 2014 winter wheat production down 10 percent from last year at about 37.6 million tonnes, the lowest level since

2006. Spring wheat crops are reported to be developing normally and the aggregate 2014 wheat output is forecast at 52.8 million tonnes, 9 percent down from the previous year. Regarding coarse grains, latest reports indicate that the 2014 maize crop is generally developing normally, with condition ratings in late June, putting 74 percent of the crop in good to excellent condition compared to 65 percent at the same time in 2013. Although plantings dropped somewhat compared to the previous year, less abandonment and better yields are expected to maintain production about the previous year's level at 354 million tonnes.

Table 17. North America, Europe and Oceania cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
North America	88.9	95.5	82.5	310.9	398.6	392.8	9.1	8.6	9.7	408.8	502.7	484.9	-3.5
Canada	27.2	37.5	29.6	24.5	28.8	23.9	0.0	0.0	0.0	51.7	66.3	53.5	-19.4
United States	61.7	58.0	52.8	286.3	369.8	368.9	9.1	8.6	9.7	357.0	436.3	431.4	-1.1
Europe	193.1	225.4	226.5	219.7	250.0	244.6	4.4	4.0	4.2	417.2	479.4	475.3	-0.9
Belarus	2.1	1.9	2.0	6.7	6.2	6.1	0.0	0.0	0.0	8.8	8.1	8.1	0.1
EU	132.6	143.5	147.3	144.1	157.1	155.3	3.1	2.9	3.0	279.8	303.5	305.6	0.7
Russian Federation	37.7	52.1	52.0	29.5	35.6	34.9	1.1	0.9	1.0	68.2	88.6	87.9	-0.8
Serbia	1.9	2.7	2.4	3.9	6.3	7.2	0.0	0.0	0.0	5.8	9.0	9.6	6.3
Ukraine	15.8	22.3	20.0	29.9	40.3	36.9	0.2	0.2	0.2	45.9	62.8	57.1	-9.1
Oceania	22.8	27.3	25.1	12.3	14.3	11.4	0.9	1.2	0.8	36.0	42.8	37.4	-12.7
Australia	22.5	27.0	24.8	11.8	13.8	10.9	0.9	1.2	0.8	35.1	41.9	36.5	-13.0

Note: Totals and percentage change computed from unrounded data.

In **Canada**, prospects for the 2014 wheat crop are generally satisfactory although the season so far has been characterized by below-normal temperatures, which delayed planting during the spring and hampered crop establishment and development. Given an estimated 5 percent reduction in wheat plantings in response to lower prices and relatively high stocks, and the likelihood that yields will not match last year's good levels, Canada's production of wheat in 2014 is forecast to fall sharply by some 21 percent to about 29.6 million tonnes from last year's bumper level.

Europe

European Union

Favourable prospects for the 2014 cereal production

With harvesting already underway in many parts of the **European Union**, latest forecasts put the 2014 aggregate wheat output at some 147 million tonnes, 2.7 percent up from 2013 and the second largest crop on record after 2008. Prospects for the other small coarse grains and maize crops are also favourable. Output of maize is expected to rise by some 4 percent to 66 million tonnes.

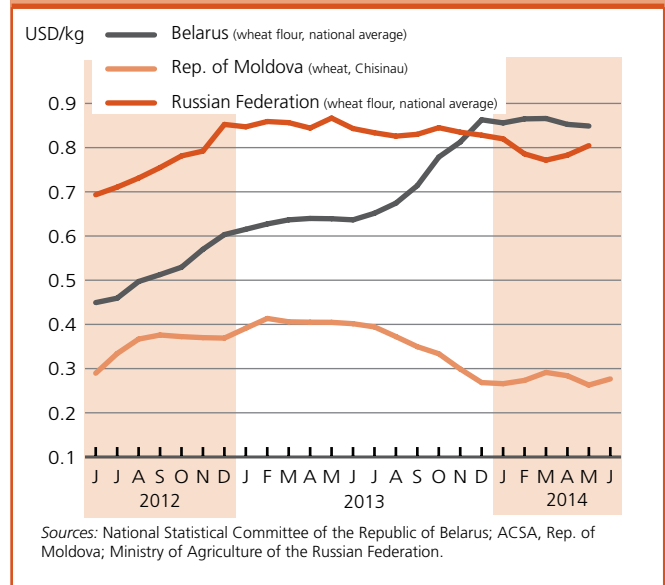
CIS in Europe

The 2014 aggregate cereal production is forecast to decrease, but remain higher than the average

The 2014 winter crops are reported to be in generally good conditions across the subregion and planting of the spring cereals is progressing at normal pace, despite some late start in several countries and unusual dry and cold weather in April. Favourable weather, with well-distributed rainfall during May and June, benefited early crop development. Assuming favourable weather conditions during the remainder of the season, the aggregate cereal production in 2014 is forecast at 155 million tonnes, some 4 percent below the record level of 2013, but 10 percent above the preceding five-year average.

In **the Russian Federation**, the aggregate cereal production, mainly wheat, is tentatively forecast at 87.9 million tonnes similar to last year's above-average level. By contrast, in **Ukraine** the 2014 aggregate cereal production, mainly wheat and maize, is forecast to decrease by 9 percent to 57.1 million tonnes, as yields are projected to return to average, after record levels in 2013. In the other two European CIS countries, **Belarus** and the **Republic of Moldova**, cereal production is expected to remain close to last year's bumper level. However, given that the bulk of the 2014 wheat and coarse grains is currently being planted, the situation could change with the progress of the season.

Figure 13. Retail wheat and wheat flour prices in Belarus, Russian Federation and Republic of Moldova



Exports in 2013/14 marketing year estimated at record levels

Due to bumper 2013 cereal productions in the main exporting countries of the subregion, the aggregate cereal exports for the 2013/14 marketing year (July/June), mainly wheat and maize crops, are estimated at 59.5 million tonnes, considerably above the previous year's sharply-reduced level. Total wheat exports in 2013/14 are estimated to increase by 11.8 million tonnes or 68 percent, to a record level of 29.1 million tonnes, mainly on account of higher exports from **the Russian Federation**, estimated to increase by 84 percent, and from Ukraine, where a 42 percent increase was recorded. Similarly, total maize exports are estimated at 24.5 million tonnes, approximately 52 percent up from previous year's high level, mainly due to a 6.5 million tonnes increase in exportable surpluses from **Ukraine**, following a record maize production in 2013.

Wheat flour prices generally stable, but at record levels in Ukraine

In most countries of the subregion, prices of wheat flour have remained stable in recent months, reflecting adequate supplies from the good 2013 outputs and imports, coupled with governments' efforts to keep prices stable. By contrast, in **Ukraine**, prices of wheat, wheat flour and maize continued to increase sharply and reached record levels in nominal terms in May, following the strong devaluation of the national currency since early 2014 and the political turmoil in the country.

Oceania

Winter grain prospects generally satisfactory but concern is rising over rainfall forecasts for the season

As of late June, prospects for **Australia's** main winter grain crops (mostly wheat and barley) remained generally satisfactory. Adequate moisture for planting was reported in most of the main growing areas after good rains in April, but conditions became progressively drier towards the end of the planting period in June, especially in New South Wales. Based on planting information

and yield prospects as of June, output of wheat is forecast at 24.8 million tonnes in 2014, some 8 percent down from the 2013 bumper crop. However, concern is currently rising over the outlook for rainfall during the remainder of the season as there is some evidence that would support a developing El Niño event. El Niño events are usually (but not always) associated with below-normal rainfall in the second half of the year (from July) across large parts of southern and inland eastern Australia. Should this phenomenon materialize, this could significantly affect cereal yields and production.

GIEWS Earth Observation

FAO's Global Information and Early Warning System (GIEWS) is pleased to announce its new Earth Observation web page at:

www.fao.org/giews/earthobservation

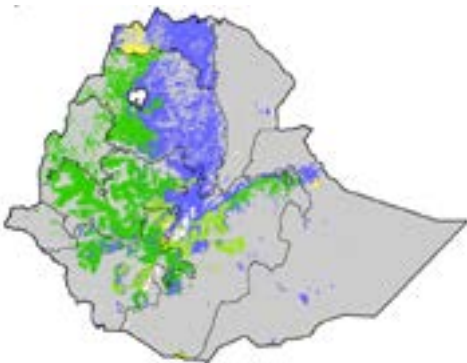
To support crop monitoring and assessment of production prospects for food crops across the globe, GIEWS utilizes remote sensing data that can provide a valuable insight on water availability and vegetation health during cropping seasons. In addition to traditional products already used by GIEWS for many years such as rainfall estimates and the Normalized Difference Vegetation Index (NDVI), the new web page also includes the **Agricultural Stress Index System (ASIS)**, a new quick-look indicator recently developed by GIEWS and NRC for early identification of agricultural areas affected by dry spells, or drought in extreme cases.



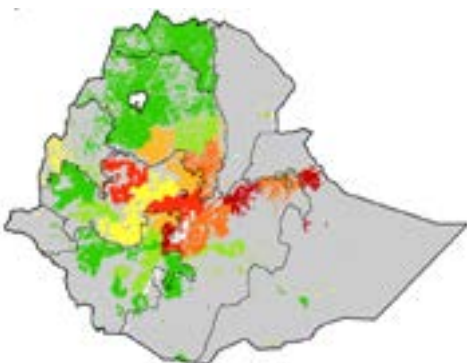
Monitoring Agriculture Drought with Remote Sensing Data

ASIS is a tool for early identification of agricultural areas affected by drought in the current season

Ethiopia - percent of crop land affected by drought per gaul 2 region (ASI)



From start of season 1 to dekad 2 June 2014



Complete season 1 of 2002



Features of ASIS

- Temporal and spatial integration of vegetation index and land surface temperature to simplify the interpretation of the data for non-remote sensing experts
- Near real-time products on 10-day basis showing "hot spots" i.e. agricultural areas probably affected by drought
- Unique time series of 30 years of vegetation index at 1km resolution
- Archive of agricultural drought hotspots since 1984

Learn more about ASIS at:

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ASIS has been developed in collaboration with:



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Table A1. Global cereal supply and demand indicators

	Average 2007/08 - 2011/12	2010/11	2011/12	2012/13	2013/14	2014/15
1. Ratio of world stocks to utilization (%)						
Wheat	25.3	26.4	26.3	22.9	24.9	25.3
Coarse grains	15.9	14.7	15.3	13.9	17.3	18.9
Rice	29.9	30.9	33.8	35.7	36.2	35.6
Total cereals	21.5	21.5	22.3	20.9	23.3	24.3
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	121.1	124.5	115.8	118.3	108.1	121.4
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	18.3	20.7	17.9	14.1	14.3	14.4
Coarse grains	12.9	10.7	10.8	8.3	10.9	13.3
Rice	22.0	20.7	25.2	28.1	27.8	26.9
Total cereals	17.7	17.4	18.0	16.9	17.7	18.2
	Annual trend growth rate 2004-2013	2010	Change from previous year			2014
		2010	2011	2012	2013	2014
4. Changes in world cereal production (%)						
	2.2	-0.4	4.3	-2.0	9.3	-0.9
5. Changes in cereal production in the LIFDCs (%)						
	1.1	8.9	1.8	4.6	0.3	1.1
6. Changes in cereal production in the LIFDCs less India (%)						
	-0.6	9.9	-3.6	6.5	0.2	2.0
	Average 2007-2011	2010	Change from previous year (%)			2014*
		2010	2011	2012	2013	2014*
7. Selected cereal price indices:						
Wheat	184.9	10.6	31.8	-4.8	-4.9	-7.2
Maize	194.8	12.0	57.6	2.2	-12.9	-29.0
Rice	232.2	-10.0	6.6	-4.6	0.8	-0.8

Notes:

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

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

Major Wheat Exporters are Argentina, Australia, Canada, the EU, Kazakhstan, Russian Fed., Ukraine and the United States; Major Coarse Grain Exporters are Argentina, Australia, Brazil, Canada, the EU, Russian Fed., Ukraine and the United States; Major Rice Exporters are India, Pakistan, Thailand, the United States, and Viet Nam.

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

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

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

*January-June average.

Table A2. World cereal stocks¹
(million tonnes)

	2010	2011	2012	2013	2014 estimate	2015 forecast
TOTAL CEREALS	522.9	500.8	520.5	503.1	573.9	604.1
Wheat	190.2	184.7	180.5	157.1	173.9	180.0
held by:						
- main exporters ²	55.2	51.2	42.7	36.2	41.9	42.1
- others	135.0	133.5	137.8	120.9	132.0	137.9
Coarse grains	195.2	170.9	178.6	171.1	218.3	241.1
held by:						
- main exporters ²	87.7	62.8	59.5	47.7	68.8	83.3
- others	107.5	108.1	119.1	123.4	149.5	157.8
Rice (milled basis)	137.5	145.2	161.4	174.9	181.6	183.0
held by:						
- main exporters ²	33.4	33.3	41.5	47.2	48.4	47.7
- others	104.1	111.9	119.9	127.7	133.2	135.3
Developed countries	191.7	153.3	150.4	117.2	140.9	154.7
Australia	7.5	9.7	7.8	5.0	6.3	5.0
Canada	13.6	11.2	9.4	8.2	18.3	14.6
European Union	45.7	32.5	32.7	25.8	33.4	37.6
Japan	4.8	4.8	4.9	5.2	5.4	5.4
Russian Federation	21.2	18.0	15.2	7.6	6.8	6.7
South Africa	3.1	4.0	2.5	2.3	1.5	2.1
Ukraine	6.8	5.3	11.0	6.4	7.1	6.7
United States	75.9	57.3	49.3	44.2	49.1	62.8
Developing countries	331.2	347.5	370.1	385.9	433.0	449.3
Asia	275.9	285.2	305.9	330.8	366.3	381.6
China	164.2	167.6	172.6	188.9	218.2	229.3
India	35.5	38.3	45.6	49.4	51.1	53.4
Indonesia	8.3	10.4	12.4	13.6	14.0	14.2
Iran (Islamic Republic of)	5.0	3.6	2.1	6.6	7.7	9.5
Korea, Republic of	3.8	4.3	4.2	4.0	4.2	4.9
Pakistan	4.8	3.4	5.4	4.0	4.4	4.8
Philippines	4.3	3.3	2.6	3.1	3.5	3.7
Syrian Arab Republic	4.7	3.8	3.4	2.6	1.9	1.1
Turkey	4.2	4.1	4.9	3.7	4.5	3.8
Africa	30.0	34.7	37.3	35.1	34.8	33.2
Algeria	3.6	3.9	4.3	5.0	5.7	5.4
Egypt	6.6	5.9	8.1	6.1	6.3	6.5
Ethiopia	1.5	1.9	2.0	1.9	2.4	2.4
Morocco	3.1	4.0	4.6	3.4	5.2	4.6
Nigeria	1.2	1.4	1.3	0.8	1.3	1.0
Tunisia	1.5	0.8	0.8	1.2	1.0	1.2
Central America	4.4	6.1	4.8	5.0	6.3	6.3
Mexico	2.4	3.7	2.3	2.5	3.7	3.5
South America	20.6	21.2	21.7	14.8	25.2	27.9
Argentina	2.1	5.5	4.9	2.3	5.3	7.2
Brazil	11.8	8.5	8.8	5.2	11.6	13.0

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

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

² Major Wheat Exporters are Argentina, Australia, Canada, the EU, Kazakhstan, Russian Fed., Ukraine and the United States; Major Coarse Grain Exporters are Argentina, Australia, Brazil, Canada, the EU, Russian Fed., Ukraine and the United States; Major Rice Exporters are India, Pakistan, Thailand, the United States, and Viet Nam.

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

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
Monthly						
2012 - June	288	250	263	268	238	234
2012 - July	352	318	314	330	285	293
2012 - August	362	332	335	328	294	296
2012 - September	372	341	336	323	278	286
2012 - October	373	339	332	320	274	290
2012 - November	374	346	345	324	294	289
2012 - December	359	325	360	310	288	288
2013 - January	348	311	362	303	294	287
2013 - February	329	297	358	303	283	288
2013 - March	323	286	346	309	276	297
2013 - April	324	279	324	282	242	261
2013 - May	329	277	315	295	257	254
2013 - June	321	270	310	300	264	246
2013 - July	311	257	302	282	241	232
2013 - August	315	251	281	238	221	219
2013 - September	312	258	300	209	219	217
2013 - October	333	289	344	201	207	204
2013 - November	317	274	353	199	207	196
2013 - December	301	267	340	197	212	207
2014 - January	288	248	330	198	215	216
2014 - February	303	261	328	209	218	224
2014 - March	334	285	340	222	226	228
2014 - April	340	281	361	224	229	226
2014 - May	345	271	372	217	224	223
2014 - June	314	235	365	202	204	220

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2013/14 or 2014 estimates
(thousand tonnes)

	2012/13 or 2013				2013/14 or 2014			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		24 649.7	1 181.4	25 831.1	28 044.3	6 462.4	430.0	6 032.4
Eastern Africa		6 671.4	547.1	7 218.5	8 087.5	2 583.1	329.6	2 253.5
Burundi	Jan./Dec.	126.8	13.3	140.1	120.0	13.4	1.3	12.1
Comoros	Jan./Dec.	59.5	0.0	59.5	61.0	1.5	0.0	1.5
Djibouti	Jan./Dec.	99.0	10.4	109.4	98.0	20.6	0.9	19.7
Eritrea	Jan./Dec.	399.0	7.0	406.0	434.0	0.2	0.0	0.2
Ethiopia	Jan./Dec.	293.6	126.7	420.3	685.0	107.6	61.2	46.4
Kenya	Oct./Sept.	1 946.5	76.6	2 023.1	2 061.3	591.2	49.8	541.4
Rwanda	Jan./Dec.	121.8	0.7	122.5	81.8	24.0	0.2	23.8
Somalia	Aug./July	392.8	63.3	456.1	540.0	61.8	61.8	0.0
Sudan	Nov./Oct.	2 124.9	210.7	2 335.6	2 594.0	1 047.2	109.3	937.9
Uganda	Jan./Dec.	338.9	29.1	368.0	470.0	117.9	0.0	117.9
United Rep. of Tanzania	June/May	768.6	9.3	777.9	942.4	597.7	45.1	552.6
Southern Africa		1 766.3	230.0	1 996.3	2 737.4	1 611.0	43.8	1 567.2
Lesotho	April/March	242.0	5.0	247.0	173.0	110.0	1.2	108.8
Madagascar	April/March	210.5	26.6	237.1	516.4	72.1	14.7	57.4
Malawi	April/March	79.0	18.2	97.2	212.0	204.0	18.9	185.1
Mozambique	April/March	762.2	120.8	883.0	1 095.0	803.3	4.3	799.0
Zimbabwe	April/March	472.6	59.4	532.0	741.0	421.6	4.7	416.9
Western Africa		14 304.1	233.1	14 537.2	15 098.4	1 970.2	42.1	1 928.1
Coastal Countries		10 786.5	83.4	10 869.9	11 485.5	1 333.6	0.8	1 332.8
Benin	Jan./Dec.	433.0	14.0	447.0	462.0	20.7	0.0	20.7
Côte d'Ivoire	Jan./Dec.	1 762.8	7.8	1 770.6	1 820.5	157.1	0.0	157.1
Ghana	Jan./Dec.	1 038.9	6.1	1 045.0	1 060.0	56.2	0.1	56.1
Guinea	Jan./Dec.	456.8	5.6	462.4	432.5	1.0	0.0	1.0
Liberia	Jan./Dec.	340.0	44.0	384.0	414.0	1.6	0.7	0.9
Nigeria	Jan./Dec.	6 320.0	0.0	6 320.0	6 870.0	1 042.0	0.0	1 042.0
Sierra Leone	Jan./Dec.	190.0	5.4	195.4	161.0	33.5	0.0	33.5
Togo	Jan./Dec.	245.0	0.5	245.5	265.5	21.5	0.0	21.5
Sahelian Countries		3 517.6	149.7	3 667.3	3 612.9	636.6	41.3	595.3
Burkina Faso	Nov./Oct.	446.9	7.2	454.1	435.0	39.8	2.3	37.5
Chad	Nov./Oct.	118.2	59.6	177.8	142.2	46.2	28.6	17.6
Gambia	Nov./Oct.	192.0	20.5	212.5	205.5	33.1	0.0	33.1
Guinea-Bissau	Nov./Oct.	148.1	6.2	154.3	154.3	1.1	0.9	0.2
Mali	Nov./Oct.	199.6	11.6	211.2	258.2	123.0	4.9	118.1
Mauritania	Nov./Oct.	457.0	13.5	470.5	487.0	102.8	0.2	102.6
Niger	Nov./Oct.	431.7	30.2	461.9	457.4	6.9	2.4	4.5
Senegal	Nov./Oct.	1 524.1	0.9	1 525.0	1 473.3	283.7	2.0	281.7
Central Africa		1 907.9	171.2	2 079.1	2 121.0	298.1	14.5	283.6
Cameroon	Jan./Dec.	948.3	1.8	950.1	947.0	133.3	3.4	129.9
Cent.Afr.Rep.	Jan./Dec.	39.7	11.3	51.0	75.0	0.5	0.3	0.2
Congo	Jan./Dec.	303.2	7.8	311.0	312.0	74.4	0.0	74.4
Dem.Rep.of the Congo	Jan./Dec.	599.7	150.3	750.0	770.0	87.6	10.8	76.8
Sao Tome and Principe	Jan./Dec.	17.0	0.0	17.0	17.0	2.3	0.0	2.3

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2013/14 or 2014 estimates
(thousand tonnes)

	Marketing year	2012/13 or 2013 Actual imports			2013/14 or 2014 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		15 912.2	655.9	16 568.1	19 999.2	8 594.8	142.5	8 452.3
Cis in Asia		3 640.5	3.7	3 644.2	3 876.7	3 230.9	0.0	3 230.9
Kyrgyzstan	July/June	508.5	3.7	512.2	508.2	452.7	0.0	452.7
Tajikistan	July/June	1 112.0	0.0	1 112.0	1 041.5	879.4	0.0	879.4
Uzbekistan	July/June	2 020.0	0.0	2 020.0	2 327.0	1 898.8	0.0	1 898.8
Far East		7 670.7	501.2	8 171.9	11 105.5	3 984.6	82.8	3 901.8
Bangladesh	July/June	1 773.0	133.0	1 906.0	3 180.0	1 203.2	25.8	1 177.4
Bhutan	July/June	72.6	0.0	72.6	66.1	0.0	0.0	0.0
D.P.R. of Korea	Nov./Oct.	108.3	290.3	398.6	340.1	25.2	12.2	13.0
India	April/March	116.6	0.5	117.1	130.0	77.9	0.0	77.9
Mongolia	Oct./Sept.	115.8	0.0	115.8	155.8	28.0	0.0	28.0
Nepal	July/June	530.1	1.7	531.8	521.8	7.0	4.2	2.8
Philippines	July/June	3 851.0	40.0	3 891.0	5 587.0	2 433.4	40.4	2 393.0
Sri Lanka	Jan./Dec.	1 103.3	35.7	1 139.0	1 124.7	209.9	0.2	209.7
Near East		4 601.0	151.0	4 752.0	5 017.0	1 379.3	59.7	1 319.6
Afghanistan	July/June	1 151.0	101.0	1 252.0	1 247.0	465.1	14.8	450.3
Yemen	Jan./Dec.	3 450.0	50.0	3 500.0	3 770.0	914.2	44.9	869.3
CENTRAL AMERICA		1 721.1	101.2	1 822.3	1 949.4	814.0	14.2	799.8
Haiti	July/June	547.3	82.4	629.7	706.1	179.0	8.7	170.3
Honduras	July/June	762.2	16.0	778.2	828.0	415.5	3.3	412.2
Nicaragua	July/June	411.6	2.8	414.4	415.3	219.5	2.2	217.3
OCEANIA		433.2	0.0	433.2	458.2	70.4	0.0	70.4
Papua New Guinea	Jan./Dec.	390.2	0.0	390.2	415.2	65.9	0.0	65.9
Solomon Islands	Jan./Dec.	43.0	0.0	43.0	43.0	4.5	0.0	4.5
TOTAL		42 716.2	1 938.5	44 654.7	50 451.1	15 941.6	586.7	15 354.9

Source: FAO

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

² Estimates based on information as of early June 2014.

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This report is based on information available as of early June 2014.

Enquiries may be directed to:

Global Information and Early Warning System on Food and Agriculture (GIEWS)
Trade and Markets Division (EST)
Food and Agriculture Organization of the United Nations
Viale delle Terme di Caracalla
00153 Rome - Italy
Direct Facsimile: 0039-06-5705-4495
E-mail: GIEWS1@fao.org

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