Food and Agriculture Organization of the United Nations

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CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

45

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 45 countries, including 34 in Africa, 9 in Asia and 2 in Latin America and the Caribbean, are in need of external assistance for food. Conflicts and climate-related shocks continue to underpin the high levels of severe food insecurity. The effects of the COVID-19 pandemic, primarily in terms of income losses, have exacerbated vulnerabilities and heightened existing levels of food insecurity.

Asia	0.9
Africa	2.0
Central America and the Caribbean	-0.9
South America	-2.0
North America	4.5
Europe	3.9
Oceania	-9.3
World	**1.7**

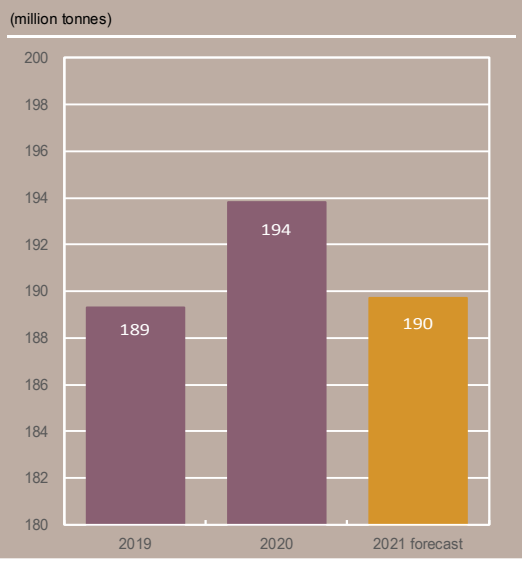
World cereal production 2021 over 2020

(yearly percentage change)

+1.7%

LIFDC cereal production 2021 over 2020

-2.1%



REGIONAL HIGHLIGHTS

AFRICA Following poor main harvests in southern parts of East Africa, production prospects are more positive in northern countries, on account of favourable weather. Outlooks are mixed in West African and Central African countries, where less-than-favourable rainfall forecasts and persisting conflicts are impairing production prospects. The bulk of the main season harvests were completed in North Africa and Southern Africa, and outputs are estimated at above-average levels.

ASIA Widespread and prolonged rainfall deficits in Near East countries are expected to result in below-average cereal outputs. In Far East countries, the production outlook for the 2021 cereal crops is favourable, owing to large plantings and conducive weather conditions. In CIS Asia, scarce precipitation amounts have cut back production expectations and near-average cereal harvests are forecast in 2021.

LATIN AMERICA AND THE CARIBBEAN In South America, cereal harvests are forecast at high levels in 2021, but continued dryness in Brazil has sharply reduced prospects compared to initial expectations. Cereal outputs in Central America in 2021 are forecast slightly below average, as dryness curbs yield prospects.

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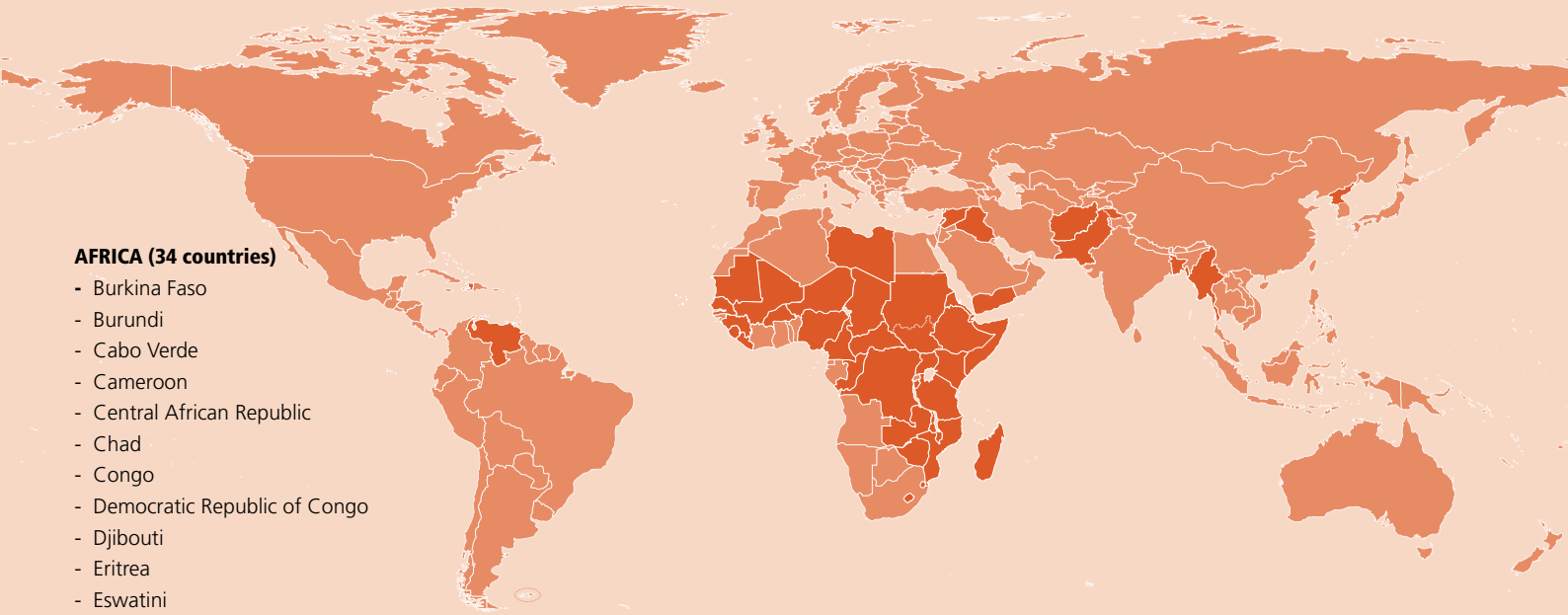
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



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

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

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

** See Terminology (*page 6*)

Source: GIEWS, 2021. *Crop Prospects and Food Situation #2* [online]. [Cited 8 July 2021], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

In addition to the factors listed below, the following countries have been affected by the COVID-19 pandemic and as a result, the impact of the pandemic is considered as a key factor that has worsened food insecurity and increased the need for humanitarian assistance in all countries, although it may not be mentioned specifically.

AFRICA (34 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, population displacements

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3: "Crisis" and above) is estimated at 2.3 million in the April–August 2021 lean season, due to armed violence that followed the December 2020 elections, adding to the already high levels of civil insecurity.
- About 1.4 million people are either internally displaced or refugees in neighbouring countries.

Kenya

Poor seasonal rains, desert locusts

- About 2 million people were estimated to be severely food insecure in the March–May 2021 period, reflecting the poor performance of both the October–December 2020 "short-rains" and the March–May 2021 "long-rains" that affected crop and livestock production in northern and eastern pastoral, agro-pastoral and marginal agriculture areas.

Somalia

Poor seasonal rains, civil insecurity, desert locusts

- About 2.8 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") in the April–September 2021 period, mainly as a result of the cumulative impact of poor October–December 2020 "Deyr" rains and April–June "Gu" rains, which severely affected crop and livestock production.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes

- About 1 million people are estimated to be severely food insecure in the June–September 2021 period, mainly due to livelihood losses caused by poor rains in northern areas and by floods in western areas bordering Lake Tanganyika. The socio-economic impact of the COVID-19 pandemic has put further constraints on livelihoods of vulnerable households.

Chad

Civil insecurity

- According to the latest "Cadre Harmonisé" (CH) analysis, about 1.78 million people are projected to be in CH Phase 3: "Crisis" and above in the June–August 2021 period due to persisting insecurity in Lac and Tibesti regions which continues to disrupt livelihood activities and to cause population displacements.
- About 400 000 people were displaced due to insecurity in the Lake Chad Region. In addition, 505 000 refugees from the Central African Republic, Nigeria and the Sudan reside in the country due to conflicts.

Democratic Republic of the Congo

Persisting civil insecurity

- According to the March 2021 IPC analysis, 27.3 million people are estimated to be severely food insecure in the February–July 2021 period, the highest level on record. This is due to the severe impact of the COVID-19 pandemic on the local economy and the ongoing conflict in eastern provinces, which triggered population displacements.
- The eruption, on 22 May 2021, of the Nyiragongo volcano, in North Kivu Province, caused the displacement of about 415 000 people.

Djibouti

Floods

- About 194 000 people are estimated to be severely food insecure in the January–August 2021 period, mainly due to livelihood losses caused by floods and landslides, and as a result of the socio-economic impact of the pandemic on the livelihoods of vulnerable households.

Eritrea

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

Ethiopia

High food prices, floods, desert locusts, conflict in the Tigray Region

- More than 16 million people were estimated to be severely food insecure in the May–June 2021 period. Particular concerns exist for the Tigray Region and neighbouring zones of Amhara and Afar regions, where 5.5 million people (about 60 percent of the population) are estimated to face severe food insecurity, including 350 000 people in "IPC Phase 5: "Catastrophe", due to the conflict which started in November 2020.

Niger

Civil conflict

- According to the latest CH analysis, about 2.3 million people are assessed to need humanitarian assistance in the June–August 2021 period due to the increase in security incidents which have resulted in widespread disruption of agricultural and marketing activities, diminishing livelihood opportunities for households.
- An estimated 300 320 people have been displaced in Diffa, Tahoua and Tillabery regions due to the civil conflicts. In addition, the country hosts 240 000 refugees, mainly from Nigeria and Mali.

Nigeria

Persisting conflict in northern areas

- According to the latest CH analysis, about 12.8 million people are assessed to be in need of humanitarian assistance in the June–August 2021 period as a result of worsening conflict that is driving new population displacements, especially in the North East, North West and North Central regions. Over 2.8 million people are estimated to be internally displaced in northeastern states of Adamawa, Borno and Yobe, due to communal clashes in northwestern/northcentral zones and natural disasters. The areas inaccessible to humanitarian interventions are facing the worst food insecurity conditions.

South Sudan

Economic downturn, civil insecurity, lingering impact of floods and prolonged conflict

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, driven by insufficient food supplies, an economic downturn, high food prices and the lingering impact of widespread floods in 2020. About 7.2 million people (about 60 percent of the total population) are estimated to be severely food insecure in the April–July 2021 period.
- Particular concern exists for households in Jonglei, Northern Bahr-el-Ghazal and Warrap states and in neighbouring Pibor Administrative Area, where 60–85 percent of the population is estimated to be severely food insecure, with a total of 108 000 people facing IPC Phase 5: "Catastrophe" levels of food insecurity.

Zimbabwe

High food prices and economic downturn

- A well above-average cereal production in 2021 has resulted in an improvement in food security. An estimated 1.8 million people are still assessed to be food insecure in the July–September period, about half the level in the previous year, largely on account of poor food access due to prevailing high prices and reduced incomes owing to the effects of the economic downturn.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the latest CH analysis, about 2.87 million people are estimated to need humanitarian assistance in the June–August 2021. In Centre-Nord and Sahel regions, insecurity continues to cause population displacements, further deteriorating the food security situation.
- Due to the conflict, about 1.22 million people have been displaced, of which 50 percent live in Centre-Nord Region. In addition, about 22 300 refugees, mostly from Mali, are still residing in Sahel Region.

Cabo Verde

Lingering effects of drought

- Based on the latest CH analysis, about 10 000 people (approximately 2 percent of the total population) were estimated to be in CH Phase 3: "Crisis" and above in the June–August 2020 period.

Cameroon

Civil insecurity, population displacements

- According to the March 2021 CH analysis, about 2.6 million people were estimated to be severely food insecure (CH Phase 3: "Crisis" or above) in the March–May 2021 period. This is mainly the result of

conflict, socio-political unrest and COVID-19-related economic shocks.
- About 44 percent of the severely food insecure people are in the Northwest and Southwest regions.
- As of end-May 2021, over 1 million people were internally displaced in the country.

Congo

Impact of floods, refugee influx
- Torrential rains in the north of the country in late 2020 triggered flooding and caused population displacements and extensive crop and livestock losses. The number of people affected by the floods is estimated at 170 000.
- There are about 21 000 refugees from the Central African Republic and 20 000 refugees from the Democratic Republic of the Congo residing in the country. Host communities face food shortages and limited livelihood opportunities, and refugees' food security is essentially dependent on continued humanitarian assistance.

Eswatini

Reduced incomes
- Cereal production is expected at an above-average level in 2021, boding well for households' food supplies. The economy is, however, only expected to recover moderately in 2021, following the pandemic-driven contraction in 2020, and households will continue to face food access constraints; an estimated 209 000 people are projected to be food insecure in the April–September 2021 period, down from 347 000 in the January–March period.

Guinea

Localized shortfalls of cereal production
- About 454 000 people are estimated to be in need of food assistance in the June–August 2021 period. In addition, about 6 000 refugees are residing in the country.

Lesotho

Reduced income
- Cereal production is expected at an above-average level in 2021. However, a slow economic recovery in 2021 will continue to impose constraints on households' incomes, impinging on their economic capacity to access food. Overall, the number of food insecure people is expected to decline from the estimated 582 000 that faced acute food insecurity in the October 2020–March 2021 period.

Liberia

High food prices
- According to the latest CH analysis, about 940 000 people are estimated to be in CH Phase 3: "Crisis" and above in the June–August 2021 period due to high food prices. The country is also hosting approximately 8 500 refugees.

Libya

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

Madagascar

Drought in southern areas and limited income-earning opportunities
- An estimated 1.14 million people are food insecure in southern and southeastern regions and require urgent humanitarian assistance.
- The effects of a severe drought on agricultural production in 2021 and the impact of the COVID-19 pandemic, particularly the loss of incomes due to the economic slowdown, are the key drivers of food insecurity.

Malawi

Reduced incomes
- Nationally, cereal production is estimated at a bumper high in 2021, which is expected to result in average to above-average household cereal supplies and thus improvements in food security. Despite the good food supply situation, the effects of the COVID-19 pandemic will continue to curb access to food due to reduced incomes.

Mali

Civil insecurity
- According to the latest CH analysis, about 1.37 million people are estimated to be in CH Phase 3: "Crisis" and above in the June–August 2021 period as a result of the escalation of the conflict that continues to cause population displacements, combined with the impacts of the pandemic and weather shocks.
- About 372 000 people have been displaced in central and northern parts of the country. In addition, the country hosts approximately 47 000 refugees.

Mauritania

Poor performance of agro-pastoral cropping season
- According to the latest CH analysis, about 484 000 people are assessed to need humanitarian assistance in the June–August 2021 period as a result of fodder production deficits in Trarza, Brakna, Gorgol, Guidimakha and Assaba districts.
- About 72 000 refugees, mostly from Mali require humanitarian assistance.

Mozambique

Localized shortfalls in staple food production, insecurity in northern areas
- An estimated 1.65 million people require humanitarian assistance at least up until September 2021. Populations in Cabo Delgado are experiencing the severest levels of acute food insecurity, where an estimated 227 000 people are facing IPC Phase 4: "Emergency" levels of food insecurity, reflecting the impacts of the conflict on livelihoods and rainfall deficits that caused a drop in cereal production in 2021.

Namibia

Reduced incomes
- An above-average harvest in 2021 is expected to lead to an improvement in food security compared to the previous year, however, the negative effects of the COVID-19 pandemic, primarily income and job losses, are expected to continue to constrain households' access to food.

Senegal

Localized shortfalls in cereal production
- According to the latest CH analysis, about 490 000 people are estimated to need humanitarian assistance in the June–August 2021 period due to the effects of adverse weather events (droughts and floods) on cereal and fodder production.

- An estimated 14 500 refugees, mostly from Mauritania, require humanitarian assistance.

Sierra Leone

High food prices

- About 1.76 million people are estimated to be severely food insecure during the June–August 2021 period on account of high food prices and low purchasing power, resulting in acute constraints on households' access to food.

Sudan

Conflict, civil insecurity, soaring food prices

- The number of severely food insecure people was estimated at 9.8 million in the June–September 2021 period, due to flood-induced livelihood losses sustained in 2020, soaring food prices and inter-communal conflict.

Uganda

Floods, refugee influx

- The number of severely food insecure people was estimated at 2 million in the September 2020–January 2021 period in Karamoja Region, urban areas, refugee settlements and host communities. In traditionally food secure urban areas, including the capital, Kampala, more than 600 000 people were food insecure due to the restrictive measures introduced to curb the spread of the COVID-19 virus. In rural areas, torrential rains in April and May 2020 resulted in localized crop and livelihood losses.
- About 891 000 refugees from South Sudan and about 423 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

United Republic of Tanzania

Localized shortfalls in staple food production

- About 500 000 people were estimated to be in need of emergency assistance in the May–September 2020 period, mainly in northeastern Manyara and Kilimanjaro regions and in central Dodoma and Singida regions, where 2019 harvests were affected by prolonged dry spells that resulted in significant cereal production losses.

Zambia

Reduced incomes

- The effects of the COVID-19 pandemic have aggravated food insecurity across the country, particularly due to income reductions that have constrained households' economic access to food. However, cereal production is estimated at a bumper high in 2021 and, as a result, overall food security is expected to improve compared to the previous year.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Lebanon

Financial and economic crisis

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

Syrian Arab Republic

Civil conflict, economic crisis

- A nationwide food security assessment estimated that about 12.4 million people (60 percent of the overall population) are food insecure in 2021, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and rapidly worsening economy.
- Although some international food assistance is being provided, Syrian refugees are also pressuring host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity and economic downturn

- A large portion of the population suffers from low levels of food consumption and very poor dietary diversity.
- The economic constraints, particularly resulting from the global impact of the COVID-19 pandemic, have increased the population's vulnerability to food insecurity.
- The uncovered food gap is estimated at about 860 000 tonnes in the 2020/21 marketing year (November/October). If this gap is not adequately covered through commercial imports and/or food aid, households could experience a harsh lean period, particularly from August until October, when the 2021 main season grain crops are expected to be available for consumption.

Yemen

Conflict, poverty, floods, high food and fuel prices

- The number of food insecure (IPC Phase 3: "Crisis" or above) was projected to increase by nearly 3 million to 16.2 million people in the January-June 2021 period. Out of these, an estimated 11 million people were in IPC Phase 3:"Crisis", 5 million in IPC Phase 4: "Emergency" and the number of those in IPC Phase 5: "Catastrophe" likely increased to 47 000.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict, population displacement, economic slowdown

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

Bangladesh

Economic constraints and refugee influx

- Food insecurity and poverty levels have increased due to income losses caused by the effects of the COVID-19 pandemic.
- According to the latest figures from UNHCR (April 2021), about 880 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in Cox's Bazar District.

Iraq

Civil conflict, low oil prices, economic slowdown

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

Myanmar

Conflict, political instability and economic constraints

- The political crisis, following the military takeover on 1 February 2021, resulted in increased tensions and unrest throughout

the country. The current uncertain political situation may further compromise the fragile situation of vulnerable households and the Rohingya Internally displaced persons (IDPs) residing in the country.
- Persisting conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large-scale population displacements particularly since 2017.
- Income losses due to the impact of the COVID-19 pandemic, has affected the food security situation of vulnerable households.

Pakistan

Population displacements, economic constraints and high prices of the main food staple

- The country hosts close to 1.4 million registered and approximately 0.6 million unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and are straining the already limited resources of the host communities.
- Poverty levels have increased due to losses of income-generating opportunities due to the effects of the COVID-19 pandemic on the economy.
- Prices of wheat flour, the country's main staple, were at high levels in most markets in May 2021, constraining access to food.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela (Bolivarian Republic of)

Severe economic crisis

- The total number of refugees and migrants from the country is estimated at 5.6 million, with the largest populations located in Colombia (1.7 million), Peru (1 million) and Chile (457 000). Humanitarian needs for refugees and migrants are significant. Food insecurity situations of migrants reportedly worsened in 2020 due to losses of income-generating opportunities in the host countries amid the COVID-19 pandemic. The expected slow recovery of the host countries' economies is likely to only marginally restore the livelihoods of migrants.
- According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela (R4V), the number of Venezuelan refugees and migrants (including in-transit and temporary) in need of food assistance is estimated at 3.26 million in 2021.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Reduced agricultural production, socio-political turmoil

- About 4.4 million people are estimated to be facing severe acute food insecurity and are in need of urgent food assistance in the March–June 2021 period. The high levels of food insecurity are the result of reduced cereal outputs in 2018–2020 and elevated food prices following the weakening of the currency. Income losses amid the COVID-19 pandemic and socio-political turmoil have exacerbated the already poor food security situation.

Terminology

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

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

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

page 12 (Africa)
page 22 (Asia)

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

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview

World cereal inventories in 2021/22 expected to rise for the first time since 2017/18

FAO's forecast for global cereal **production** in 2021 has been lowered marginally in July compared to the previous month to 2 817 million tonnes but is still 1.7 percent (47.8 million tonnes) higher than in 2020 and would mark a new record high. The modest month-on-month cutback principally concerns coarse grains, with global production now pegged at 1 513 million tonnes, 3 million tonnes below last month's expectation. A sharp cut to the Brazilian maize production forecast accounts for the bulk of the expected global decline, as prolonged periods of dry weather have dragged down yield expectations.

The world barley production forecast is also trimmed, owing to a lower production forecast in the European Union, reflecting smaller-than-previously expected plantings, and in several countries in the Near East on widespread dry conditions that have curtailed yield potentials. These declines more than outweigh upward revisions made to maize production forecasts in China (mainland), the Russia Federation and Ukraine. Global wheat production prospects were also dented slightly this month, as the dry weather conditions in the Near East have cutback yield prospects. As a result, the 2021 world wheat output has been lowered by 1 million tonnes to 784.7 million tonnes, still 1.2 percent higher year on year. By contrast, the forecast of global rice production in 2021 has undergone a slight upward adjustment since June, as more buoyant area expectations for Iraq and record reported yield outcomes in Argentina and Uruguay

Table 1. World cereal production
(million tonnes)

	2019	2020 estimate	2021 forecast	Change: 2021 over 2020 (%)
Asia	1 196.6	1 225.3	1 235.7	0.9
Far East	1 089.8	1 111.4	1 133.3	2.0
Near East	73.6	78.4	68.3	-12.8
CIS in Asia	33.2	35.5	34.1	-4.0
Africa	193.6	200.0	204.0	2.0
North Africa	36.0	32.6	37.3	14.3
West Africa	65.7	66.5	64.1	-3.7
Central Africa	7.1	6.9	7.0	0.9
East Africa	56.2	57.4	56.7	-1.4
Southern Africa	28.6	36.5	39.0	6.9
Central America and the Caribbean	42.5	42.6	42.2	-0.9
South America	228.5	232.7	228.1	-2.0
North America	479.4	496.8	519.3	4.5
Europe	542.2	521.8	542.4	3.9
European Union[1]	324.1	282.4	292.9	3.7
CIS in Europe	202.7	204.3	210.9	3.3
Oceania	27.9	50.2	45.5	-9.3
World	2 710.7	2 769.4	2 817.2	1.7
Developing countries	1 652.3	1 691.9	1 701.4	0.6
Developed countries	1 058.4	1 077.5	1 115.8	3.6
- wheat	760.8	775.2	784.7	1.2
- coarse grains	1 447.0	1 480.0	1 513.0	2.2
- rice (milled)	502.9	514.3	519.5	1.0

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

[1] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

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

outweighed a downward revision for the European Union, where limited water supplies for irrigation are assessed to have curtailed plantings in Spain more than previously envisaged. As a result, a record of 519.5 million tonnes of rice are now expected to be harvested in 2021, up 1 percent from 2020.

The forecast of world cereal **utilization** in 2021/22 has been lowered by 15 million tonnes in July on a monthly basis to 2 810 million tonnes, nevertheless is still 1.5 percent higher than in 2020/21. The downward revision stems largely from lower-than-earlier-anticipated utilization of maize for animal feed in China (mainland), on expectations of much greater use of other feedstuffs, as well as for industrial purposes. Despite this downward revision, world total coarse grains utilization is forecast to increase by 0.9 percent from the 2020/21 level, reaching 1 510 million tonnes in 2021/22. By contrast, the 2021/22 global wheat utilization forecast has been lifted month on month to 780 million tonnes, now up 2.7 percent from the 2020/21 level. The monthly upward revision and the projected year-on-year increase in wheat utilization are both largely attributed to greater feed use of wheat driven by its price competitiveness relative to maize. World rice utilization in 2021/22 is pegged at 520.8 million tonnes, up 1.5 percent from the previous season and little changed from June expectations. Although feed uses are also seen increasing, an anticipated expansion in food use would account for much of this yearly growth, keeping global per caput rice intake firm at close to 54 kg per person.

World cereal **stocks** by the close of seasons in 2021/22 are now forecast to rise above their opening levels for the first time since 2017/18 following a sharp upward revision of 24 million tonnes made in July to 836 million tonnes, up 2.4 percent from last year's tight level. Higher maize stocks foreseen in China (mainland) account for the bulk of this month's upward revision to world cereal inventories. Maize inventories in China (mainland) are now expected to reach 152 million tonnes, nearly 24 million tonnes higher than the previous forecast and up 3 million tonnes from their revised opening levels, marking the first year-on-year increase in six years. With this revision, stocks of coarse grains in 2021/22 are forecast to rise above their opening levels by 4 percent to 354 million tonnes. By contrast, 2021/22 wheat inventories have been lowered from the previous month but are still forecast to increase by 1.8 percent above their opening levels and reach a record 297 million tonnes, mostly reflecting anticipated build-ups in Australia, China (mainland), the European Union, India, Morocco and Ukraine. Mirroring a slight upward adjustment to carry-over expectations for Pakistan, FAO's forecast of world rice stocks at the close of 2021/22 seasons is now pegged at 184.9 million tonnes, which would represent a 0.5 percent year-on-year increase and the second highest volume on record. Based on this month's revisions to the forecasts of world cereal stocks and utilization, the global cereal stock-to-use ratio for 2021/22 is now expected to hover around 29 percent, hence on par with the 2020/21 level.

FAO's latest forecast for world **trade** in cereals in 2021/22 has been raised slightly since June and now stands at a record 472 million tonnes, representing an increase of 0.8 percent from the 2020/21 volume. At nearly 235 million tonnes and unchanged from last month, trade in coarse grains in 2021/22 (July/June) is forecast to remain near its 2020/21 estimated level. Continued large maize purchases from China (mainland) are seen supporting a record maize trade level in 2021/22, while an expected expansion in sorghum trade is seen offsetting a likely fall in barley imports due to lower anticipated purchases by China (mainland), Morocco and Saudi Arabia. Greater import demand expected from Algeria and Pakistan has lifted FAO's forecast for world wheat trade in 2021/22 to 189 million tonnes this month, an increase of 2.1 percent from 2020/21 mostly stemming from continued strong demand from several countries in Asia. International trade in rice in 2021 (January–December) is forecast at 48.2 million tonnes, up marginally from the June forecast, but 6 percent above the 2020 volume. A revival in import demand from Bangladesh, alongside rising imports by China (mainland), Côte d'Ivoire and Nigeria, are forecast to drive this increase, although a likely surge in purchases by Viet Nam (a major rice exporter) is also seen contributing to the year's global import expansion.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2019/20	2020/21 estimate	2021/22 forecast	Change: 2021/22 over 2020/21 (%)
Production[1]	*2 710.7*	*2 769.4*	*2 817.2*	*1.7*
Developing countries	*1 652.3*	*1 691.9*	*1 701.4*	*0.6*
Developed countries	*1 058.4*	*1 077.5*	*1 115.8*	*3.6*
Trade[2]	*440.1*	*468.2*	*472.0*	*0.8*
Developing countries	*165.6*	*164.4*	*164.9*	*0.3*
Developed countries	*274.5*	*303.8*	*307.2*	*1.1*
Utilization	*2 712.7*	*2 769.6*	*2 810.5*	*1.5*
Developing countries	*1 847.5*	*1 909.7*	*1 942.6*	*1.7*
Developed countries	*865.2*	*859.9*	*867.9*	*0.9*
Per caput cereal food use (kg per year)	*149.3*	*150.2*	*150.5*	*0.2*
Stocks[3]	*822.7*	*815.9*	*835.5*	*2.4*
Developing countries	*645.5*	*660.3*	*660.2*	*0.0*
Developed countries	*177.2*	*155.6*	*175.3*	*12.7*
World stock-to-use ratio (%)	***29.7***	***29.0***	***29.0***	***0.0***

Note: Totals and percentage change computed from unrounded data.

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

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

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

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

	2019/20	2020/21 estimate	2021/22 forecast	Change: 2021/22 over 2020/21 (%)
Cereal production[1]	*189.3*	*193.8*	*189.7*	*-2.1*
Utilization	*239.7*	*246.4*	*250.0*	*1.5*
Food use	*180.2*	*184.7*	*188.9*	*2.2*
Per caput cereal food use (kg per year)	*156.1*	*156.4*	*156.3*	*-0.1*
Feed	*24.7*	*25.9*	*25.9*	*-0.1*
End of season stocks[2]	*52.4*	*53.1*	*48.3*	*-8.9*

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

Table 4. Cereal production of LIFDCs
(million tonnes)

	5-year average	2020 estimate	2021 forecast	Change: 2021 over 2020 (%)
Africa (36 countries)	*110.2*	*116.1*	*115.2*	*-0.8*
East Africa	*54.7*	*57.4*	*56.7*	*-1.4*
Southern Africa	*10.4*	*11.2*	*13.3*	*18.6*
West Africa	*38.1*	*40.6*	*38.3*	*-5.6*
Central Africa	*7.0*	*6.9*	*7.0*	*0.9*
Asia (9 countries)	*72.1*	*76.7*	*73.5*	*-4.1*
CIS in Asia	*10.4*	*10.3*	*9.7*	*-5.9*
Far East	*52.8*	*55.2*	*56.6*	*2.5*
Near East	*8.8*	*11.1*	*7.2*	*-35.3*
Central America and the Caribbean (2 countries)	*1.1*	*1.0*	*1.0*	*1.8*
LIFDCs (47 countries)	*183.3*	*193.8*	*189.7*	*-2.1*

Note: Includes rice in milled terms. Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

Cereal production of Low-Income Food-Deficit Countries (LIFDCs) forecast to remain above average in 2021, despite year-on-year output declines in Asian countries

FAO's latest forecast for aggregate cereal production of the Low-Income Food-Deficit Countries (LIFDCs)[2], following the graduation of four countries out of the list in 2021, is pegged at an above-average level of 189.7 million tonnes in 2021. At this level, the aggregate output would be 4.1 million tonnes below the previous year's level.

The yearly decline mostly relates to lower expected outputs in *Asian* countries, principally Afghanistan and the Syrian Arab Republic, where prolonged and widespread periods of rainfall deficits have curbed yield potentials and consequently the 2021 cereal harvests are forecast at below-average levels. Scarce precipitation amounts have also adversely affected crops in Uzbekistan and the harvest is also foreseen at a moderately below-average level. Other countries in the *Asia* region are expected to gather slightly above-average harvests in 2021.

In *Africa*, aggregate cereal production among the LIFDCs is forecast to remain at an above-average level in 2021, but lower than the bumper output of the previous year. Significant production increases are estimated in *Southern Africa* countries, particularly in Zimbabwe, where the cereal harvest is more than double the average, owing to almost ideal seasonal weather conditions. In *East Africa*, where the 2021 main season harvest will take place later in the year, early production prospects point to near-average cereal outputs. Poor rains during the minor season, with crops about to be harvested, caused low yields, especially in Somalia where the output is foreseen

[2] The inclusion of a country in the Low-Income Food Deficit Countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self-exclusion (when countries that meet the first two criteria request to be excluded from the category). The new list of LIFDCs (updated in June 2021) includes 47 countries, four less than the previous list. Three countries graduated out of the list based on income criterion - Djibouti, Solomon Islands and Viet Nam, and one country, India, graduated based on the food import criterion. For full details see: **www.fao.org/countryprofiles/lifdc**

to be 20–40 percent below the average. However, favourable rainfall is forecast for the main cropping season across the subregion, auguring well for yield prospects and supporting the expectations of near-average aggregate outputs in 2021. In *West Africa*, cereal production in 2021 is expected to exceed the average despite predictions of unfavourable weather conditions in coastal countries and the continued impact of conflicts. Cereal production in *Central Africa* is foreseen at an average level, as conflicts continue to undermine agricultural productive capacities.

In *Central America and the Caribbean*, low plantings in Haiti, owing to prohibitively high costs and low supply of agricultural inputs, underpin expectations of a below-average cereal output in 2021. In Nicaragua, production is forecast at a slightly above-average level as recent conducive rainfall is offsetting the effects of poor weather conditions earlier in the season.

Import requirements increase in 2021/22

The aggregate cereal import requirements by LIFDCs in the 2021/22 marketing year are forecast at 60.1 million tonnes, 7.5 percent above the five-year average and up 3 percent on a yearly basis. The bulk of the increase relates to *Asian* countries, notably Afghanistan, the Syrian Arab Republic and Uzbekistan, where significant production declines are expected. In *West Africa*, import requirements are also expected to increase, underpinned by mixed production prospects on account of the effects of conflicts and unfavourable seasonal weather forecasts. By contrast, in *Southern Africa*, import needs are significantly lower in 2021/22, reflecting the bumper domestic harvests.

Table 5. Cereal imports of LIFDCs

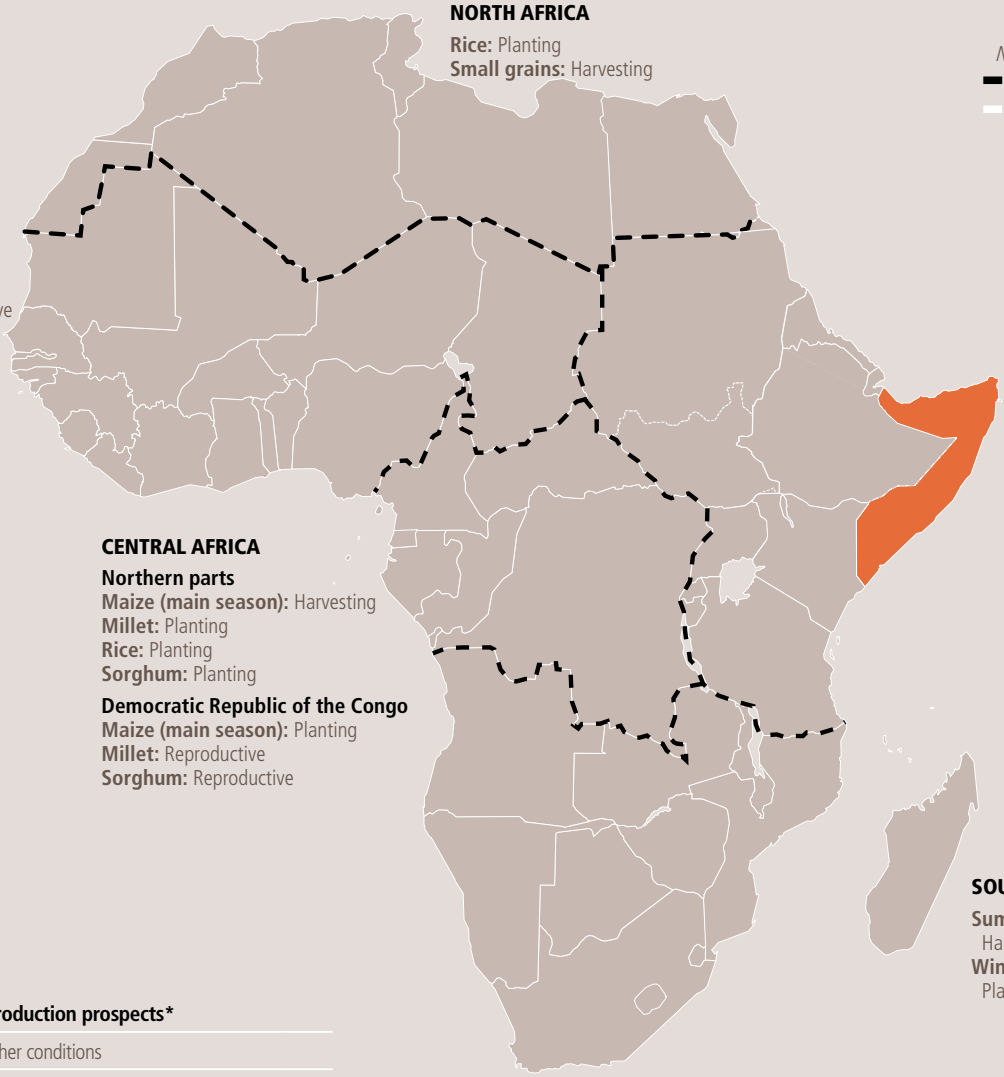
(thousand tonnes)

	2019/20 or 2020	2020/21 or 2021		2021/22 or 2022	
	Actual imports	Import estimate	*of which food aid*	Import requirement[1]	*of which food aid*
Africa (36 countries)	*28 595*	*30 908*	*1 164*	*31 127*	*1 073*
East Africa	*11 961*	*12 350*	*810*	*12 384*	*725*
Southern Africa	*3 154*	*3 768*	*17*	*2 908*	*13*
West Africa	*10 871*	*11 903*	*180*	*12 885*	*178*
Central Africa	*2 609*	*2 887*	*156*	*2 950*	*156*
Asia (9 countries)	*23 489*	*25 745*	*915*	*27 418*	*940*
CIS in Asia	*4 682*	*5 105*	*0*	*5 499*	*0*
Far East	*9 338*	*11 009*	*70*	*11 126*	*70*
Near East	*9 469*	*9 632*	*845*	*10 794*	*870*
Central America and the Caribbean (2 countries)	*1 626*	*1 482*	*15*	*1 545*	*10*
LIFDC (47 countries)	*53 709*	*58 136*	*2 094*	*60 090*	*2 023*

Note: Totals computed from unrounded data.

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

REGIONAL REVIEWS
AFRICA



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

Source: GIEWS, 2021. *Crop Prospects and Food Situation #2* [online]. [Cited 8 July 2021], modified to comply with the United Nations map No. 4045 Rev. 8.1, 2018.

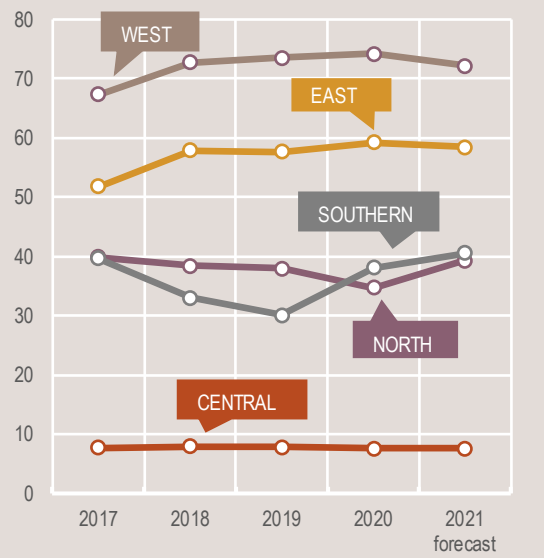
Africa Production Overview

Aggregate cereal production in Africa is forecast at 218 million tonnes in 2021, 6.2 percent above the five-year average and moderately higher on a yearly basis. The large outturn reflects bumper cereal outputs in Southern Africa and North Africa, where, despite pockets and periods of dryness, overall conducive seasonal weather conditions pushed up cereal acreages and yields.

In East Africa, where the 2021 main season cereal crops will be harvested later in the year, aggregate production is forecast to remain above average but less than the previous year, mostly owing to reduced harvests from the minor season due to erratic rainfall.

In West Africa, rainfall forecasts differ between coastal areas, less favourable, and Sudanian zone and Sahel belt, where the weather outlook is more favourable. As a result, the preliminary 2021 cereal production forecast for the subregion is pegged at a near-average level. The effect of conflicts in several countries in West Africa and Central Africa continues to undermine agricultural activities and curb production expectations in affected areas.

Cereal production
(million tonnes)



NORTH AFRICA

Above-average 2021 cereal harvest expected

In **Egypt**, **Libya** and **Morocco**, the winter wheat crop was harvested between mid-May and mid-June. In **Tunisia,** the bulk of wheat production was harvested in June, while the harvest is ongoing in **Algeria** and is expected to conclude by mid-August. In all countries, the minor winter barley crop has already been harvested.

Weather conditions in the 2020/21 cropping season varied across the subregion. In **Morocco**, although cumulative rainfall amounts between September and December 2020 were over 30 percent below the average, an even distribution of rains facilitated planting activities and the early development of crops. Favourable rainfall since early January 2021, with some areas receiving twice the average amounts, improved crop conditions and despite pockets of drought in northeastern parts of the country, wheat production is estimated at about 7.2 million tonnes, about 50 percent above the average and almost three times more than the drought-stricken harvest in 2020.

Planting of cereals in **Algeria** and **Tunisia** took place under favourable conditions. However, by mid-February 2021, dryness prevailed in most cropping areas of **Algeria** due to below-average precipitation since mid-January. Although subsequent rainfall contributed to some recovery in crop conditions in northeastern parts of the country, drought conditions prevailed elsewhere. Combined with unseasonable high temperatures, a slightly below-average wheat harvest of 2.5 million tonnes is expected; total cereal production is estimated at 3.5 million tonnes, below the five-year average and down 38 percent on a yearly basis. In **Tunisia**, except in some areas in southcentral parts of the country that experienced soil moisture deficits, overall crop conditions were favourable due to plentiful rains and wheat production is likely to be above average. In **Egypt**, most cereal crops are irrigated and preliminary production estimates point to an average output of 23.8 million tonnes. Conflict on the most fertile lands in **Libya** continues to have a negative impact on agricultural activities and production of cereals is estimated at a slightly below-average level of 209 000 tonnes in 2021.

The subregion's aggregate cereal production in 2021 is estimated at 39.3 million tonnes, including 20 million tonnes of wheat and 4.3 million tonnes of barley. The total output in 2021 is about 5.8 percent above the average and 13 percent above the outturn of the previous year. Despite the above-average 2021 outturn, the subregion's aggregate cereal import requirement in the 2021/22 marketing year (July/June) is estimated at 53.7 million tonnes (wheat accounts for 60 percent of this quantity), 5.6 percent above the five-year average as countries are aiming to rebuild their stocks.

Food inflation rates remained at modest levels in early 2021

Despite the strengthening of international food prices since May 2020, year on year food inflation rates during the first part of 2021 (latest information available) remained at low levels. Prices of basic food commodities remain subsidized by the governments across the subregion, buffering the transmission of any eventual price changes to final consumers. In **Morocco**, in April 2021, the annual food inflation rate increased from negative values since December 2020 to 0 percent, while in **Egypt** it increased from negative 0.3 percent in April 2021 to 1.8 percent in May 2021. In **Tunisia**, the annual food inflation rate was the highest in the subregion, increasing from 4.9 percent in April 2021 to 6 percent in May 2021. In **Algeria,** food prices increased by 3.4 percent year on year in January 2021 (latest information available), compared to a rate of 1.3 percent in October 2020.

In **Libya**, updated information on the food price inflation has not been available since December 2020, when it was recorded at 3.2 percent, up from 1.5 percent one month earlier. The 2021 Libya Humanitarian Needs Overview estimated the total number of people in need of humanitarian assistance at 1.3 million (23 percent of the population, up from 0.9 million one year earlier), out of which 700 000 people also require food assistance, doubling the 2020 estimate.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
North Africa	18.2	16.5	20.0	12.6	11.5	12.9	6.3	6.6	6.4	37.1	34.7	39.3	13.2
Algeria	3.3	3.8	2.5	1.6	1.8	1.0	0.0	0.0	0.0	4.9	5.6	3.5	-37.6
Egypt	8.8	9.0	9.0	8.7	8.5	8.5	6.3	6.5	6.3	23.8	24.0	23.8	-1.0
Morocco	4.8	2.6	7.2	1.7	0.7	2.7	0.1	0.1	0.1	6.5	3.4	10.0	197.0
Tunisia	1.1	1.0	1.2	0.5	0.5	0.6	0.0	0.0	0.0	1.7	1.5	1.8	19.2

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

WEST AFRICA

Despite favourable rains, prospects for 2021 cereal crops remain uncertain

The 2021 main season maize crop is developing under favourable weather conditions in southern **Côte d'Ivoire**, southern **Ghana**, southern **Togo**, central **Benin** and southern **Nigeria**, following a timely onset of seasonal rains in March. Planting of the other 2021 main season cereal crops, including paddy and sorghum, is expected to conclude in July in these countries and harvesting will take place from the third quarter of the year. Weather forecasts for the July–September 2021 period indicate a higher-than-normal likelihood of below-average rainfall amounts in coastal countries. This weather outlook infers an increased risk of prolonged dry spells that are likely to adversely affect yields and the availability of pasture and water for livestock.

In **Sierra Leone**, planting of the 2021 main season rice crop, the country's primary food staple, is also underway following a timely onset of seasonal rains. Rainfall levels have so far been average to above average, benefitting the early-planted crops, and weather forecasts point to a continuation of favourable rainfall amounts from July to September that will likely have a positive impact on yields. In **Senegal**, the second season rice crop was harvested in June. In **Mauritania**, harvesting of the off-season paddy crop, the country's key food staple, concluded in May under favourable conditions. Planting of the 2021 main season cereal crops, including the irrigated paddy crop, is underway and harvesting activities are expected to start in October.

In the Sudanian zone (southern **Mali**, **Burkina Faso** and **Chad**, northcentral **Nigeria**, northern **Benin** and **Togo**) and the Sahel belt (central **Mali**, northern **Burkina Faso**, central **Chad**, southern **Niger** and northern **Senegal**), planting of the 2021 main season cereal crops is also underway under favourable weather conditions. According to the latest Forum of the Agro-Hydro-Climatic Seasonal Forecast in Sudano-Sahelian Africa (PRESASS), above-average rainfall amounts are forecast for the June–October rainy season in the aforementioned countries, boosting prospects for crop yields and pasture production. However, localized production shortfalls are expected in areas bordering rivers, as flooding could occur in July and August 2021 due to the high likelihood of above-average rainfall.

Persistent insecurity in northeast **Nigeria**, the Lake Chad Basin, northern and central **Mali**, northeastern **Burkina Faso** and western and eastern **Niger,** continues to severely affect agricultural activities and hinder farmers' access to fields and agricultural inputs, curbing overall production expectations in the affected areas.

Adequate seasonal rains increased water and pasture availability in June 2021 in most southern parts of the subregion, leading to an improvement in livestock body conditions and increasing animals' market value. By contrast, in most pastoral areas of the Sahelian countries, seasonal dry weather conditions are still prevailing and rains are expected to start in July. In these countries, despite the ongoing pastoral lean season, forage availability is overall satisfactory in the main grazing areas. The seasonal return of domestic transhumant herds from southern to northern areas started in early March following the timely onset of rains in the south and is expected to continue until July with the onset of rainfall in northern pastoral areas. The animal health situation is generally good and only low incidences of seasonal disease outbreaks have been reported.

Coarse grain prices increased in the first half of 2021

In most countries of the subregion, prices of domestically produced coarse grains have generally increased since early 2021. In **Chad** and **the Niger,** coarse grain prices were reported at high levels during the first months of 2021, particularly in the conflict-affected areas where persistent insecurity has prevented markets from functioning normally. Strong domestic demand, partly driven by large purchases by traders and humanitarian agencies to replenish stocks, and reduced supplies from the localized flood-affected 2020 cereal output, pushed up prices significantly above their year-earlier levels. In **Burkina Faso**, **Mali** and **Senegal**, coarse grain prices were stable or seasonally increased between February and May, and remained above their year-earlier levels due to the localized production shortfalls last year, as well as COVID-19-related restrictions and insecurity that disrupted market activities. The governments in these countries, with assistance from international institutions,

Table 7. West Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
West Africa	50.4	53.3	50.2	20.6	20.8	21.8	71.1	74.2	72.1	-2.9
Burkina Faso	4.4	4.7	4.3	0.4	0.5	0.5	4.8	5.2	4.8	-7.2
Chad	2.6	2.6	2.5	0.3	0.3	0.3	2.9	2.9	2.8	-3.4
Ghana	2.9	3.7	2.9	0.8	1.0	1.0	3.7	4.6	3.8	-17.0
Mali	6.8	7.3	6.8	3.0	3.0	3.1	9.8	10.4	9.9	-4.5
Niger	5.7	5.6	5.6	0.1	0.1	0.1	5.8	5.7	5.8	1.1
Nigeria	20.4	21.0	20.4	8.1	8.2	8.8	28.6	29.2	29.2	0.1

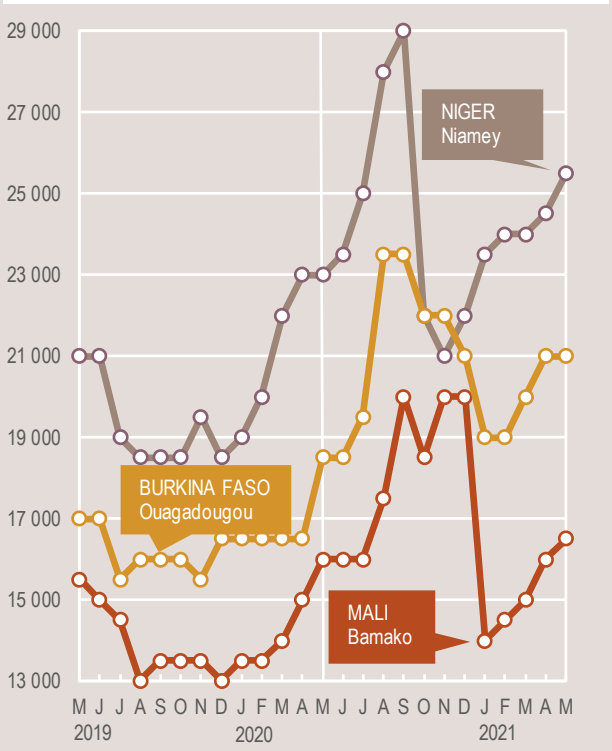
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

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

have implemented a wide range of measures to support vulnerable households, including cash and in kind food transfers, which helped to attenuate the increase in prices.

In most countries of the Sahel, prices of imported rice remained stable and were generally similar to their year-earlier levels due to adequate supplies and sufficient imports from the international market.

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



Source : Afrique Verte.

In **Benin, Ghana** and **Togo**, prices of maize were above their seasonal levels between March and May, and remained well above their year-earlier levels on account of strong domestic and export demand. In addition, measures to contain the spread of the COVID-19 virus are still in place and these have further underpinned the high price levels due to the disruptions to markets. In **Nigeria**, prices of locally produced cereals continued to increase since the beginning of 2021, driven by strong domestic demand. The weak currency, civil insecurity and high transportation costs continued to keep prices well above their year-earlier levels. In addition, in some areas of the northeast, the effects of the conflict drove up cereal prices sharply and they were at all-time highs as of March 2021.

Alarming food security situation in central Sahel, northern Nigeria and the Lake Chad Basin due to persisting conflict

The overall food security situation is expected to worsen across the subregion during the 2021 lean season, from June to August, due to several factors that have affected agricultural production in 2020, hampered livelihood activities and reduced households' access to food. According to the March 2021 "Cadre Harmonisé" analysis, about 27 million people are estimated to be severely food insecure (CH Phase 3: "Crisis" and above) between June and August 2021, the highest level in the last ten years and well above the 16.9 million estimated one year before. Most food insecure people are located in **Nigeria**, where about 12.8 million people need urgent food assistance, followed by **Burkina Faso** (2.8 million), **the Niger** (2.3 million), **Chad** and **Sierra Leone** (1.8 million in each country) and **Mali** (1.3 million).

The persisting conflict in northeast **Nigeria**, central and northern **Mali**, eastern **Niger**, northern **Burkina Faso**, **Mali**, **the Niger** and **Burkina Faso** (Liptake Gourma Region) and **Chad** (Lake Chad Basin and Tibesti Region) continues to cause massive population displacements and hinder food availability and access. Moreover, the conflict is also severely damaging local livelihood systems, restricting the delivery of humanitarian assistance and disrupting agricultural activities. The prolonged conflict is severely affecting the livelihoods of most households that continue to rely on external food assistance to cover their basic food needs. According to the International Organization for Migration (IOM), the deterioration of the security situation is leading to an increase in the population who have been internally displaced in **Chad**, **Burkina Faso**, **Mali**, **the Niger** and **Nigeria** from 4 million people in April–May 2020 to over 5.1 million in April–May 2021.

CENTRAL AFRICA

Agricultural production in 2021 expected to be impacted by conflicts, displacements and COVID-19 restrictive measures

In the uni-modal rainfall northern areas of **Cameroon** and **the Central African Republic**, planting of the 2021 millet and sorghum crops finalized in June and harvesting is expected to begin in late September. In these areas, latest weather forecasts point to average precipitation amounts between July and September 2021, boding well for crop yields. In bi-modal central and southern areas of the two countries, harvesting of the 2021 early-planted main maize crops will begin in mid-August, with some concerns for crops in Cameroon due to the high risk of flooding, as heavy rains are forecast in July and August.

Harvesting of the 2021 secondary maize crop is underway in **the Republic of the Congo**, **Gabon** and the northern provinces of **the Democratic Republic of the Congo** where the production outlooks are generally favourable, reflecting near-average precipitation amounts. In the central provinces of **the Democratic Republic of the Congo**, harvesting of the 2021 secondary season maize crop finalized in May, under overall favourable weather conditions, except in South Kivu Province, where heavy rains in mid-April caused localized flooding, resulting in some damage to standing crops. Increased violence in eastern provinces, coupled with the eruption of the Nyiragongo volcano, caused new population displacements, resulting in disruptions to agricultural operations, including harvesting of the 2021 secondary season maize and land preparation of the 2021 main season maize crops. In the southernmost uni-modal rainfall areas of **the Democratic Republic of the Congo**, harvesting of the 2021 maize crops finalized in June. Despite irregular rainfall distribution during the season, cumulative amounts were near average and overall agro-climatic conditions were conducive for normal crop development.

Ongoing conflicts and displacements, coupled with restrictive measures to control the COVID-19 pandemic, are expected to continue to affect agricultural activities and limit farmers' access to crop growing areas and inputs, with a negative impact on the 2021 crop production.

Slow trade activity contributes to keeping prices high

In **Cameroon** and **the Central African Republic**, prices of cassava and maize increased slightly between March and May 2021, in line with seasonal trends, and were higher on a yearly basis due to increased transportation costs amid COVID-19 containment measures. In both countries, in the March–May 2021 period, prices of imported food commodities, such as wheat and rice, were also at high levels as movement restrictions used to slow the spread of the COVID-19 virus also disrupted regional transportation operations and slowed down trade activity. For instance, in Cameroon, rice imports in the first quarter of 2021 were about 30 percent lower than in the same period in 2020, when COVID-19 preventive measures were not yet in place.

About 32 million people estimated to be severely food insecure in the second quarter of 2021

In the second quarter of 2021, the aggregate number of severely food insecure people is estimated at 32.2 million. Ongoing conflicts and displacements have continued to result in the widespread disruption of agricultural and marketing activities, severely affecting food availability and access. In addition, the socio-economic impacts of the pandemic resulted in income losses and, coupled with the high level of prices, substantially reduced households' purchasing power.

In **the Democratic Republic of the Congo**, according to the March 2021 IPC acute food insecurity analysis, about 27.3 million people (28 percent of the total population) were estimated to be severely food insecure between February and July 2021, the highest level on record. This is due to multiple shocks, including movement restrictions related to the COVID−19 pandemic that has limited cross−border trade and access to the markets, the ongoing conflict in eastern provinces and the consequential disruptions to agricultural activities that resulted in food supply shortages and high prices in some markets. In eastern areas, violence has increased in recent months, causing new displacements and leading to the declaration of a "State of Siege" on 6 May 2021 in the provinces of North Kivu and Ituri. Tensions remain also in South Kivu and, to a lesser extent, in Tanganyika provinces. The displacement of an additional 415 000 people was caused by the eruption of the Nyiragongo

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Central Africa	6.1	6.0	6.0	1.6	1.5	1.6	7.7	7.5	7.6	1.1
Cameroon	3.7	3.6	3.6	0.3	0.3	0.3	4.0	3.9	3.9	0.8
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	1.3
Democratic Republic of the Congo	2.2	2.2	2.2	1.2	1.2	1.3	3.5	3.4	3.5	1.5

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

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

volcano in North Kivu Province on 22 May 2021.

According to the latest IPC projection, about 2.3 million people (nearly half of the total population) are estimated to be in IPC Phase 3: "Crisis" and above in **the Central African Republic** during the April–August 2021 lean season, including 600 000 people classified in IPC Phase 4: "Emergency". The main driver of the high food insecurity levels is the continued civil insecurity, aggravated by the armed violence connected to the presidential and legislative elections held in December 2020, which triggered population displacements. It is estimated that about 1.4 million people (almost one-third of the country's population) are either internally displaced or refugees in neighbouring countries.

In **Cameroon**, according to the March 2021 Cadre Harmonisé (CH) analysis, about 2.6 million people (10 percent of the total population) were estimated to be severely food insecure (CH Phase 3: "Crisis" or above) in the March–May 2021 period. This mainly results from the impacts of Boko Haram incursions in the Far North Region, socio-political unrest in Northwest and Southwest regions and COVID-19-related economic shocks, which disrupted cross-border trade and agricultural practices, and caused population displacements. About 44 percent of the severely food insecure people are located in the Northwest and Southwest regions.

EAST AFRICA

Mixed performance of seasonal rains results in reduced 2021 main season harvests in parts of the subregion

In **Burundi**, **Rwanda**, southeastern **Kenya**, **Somalia**, **the United Republic of Tanzania** and **Uganda**, harvesting of the 2021 main season cereal crops is underway or about to start. The March–May rainy season had a mixed performance and production prospects vary across the subregion. Seasonal rains were particularly poor in southern and central key producing areas of **Somalia** and in southeastern and coastal marginal agricultural areas of **Kenya,** where reduced cereal outputs are expected. In southern and central **Somalia**, "Gu" rains started in April, about one month later than normal and consequently adversely impacted cereal plantings and crop germination. Above-average rains were estimated in the first half of May, which benefited crops but also triggered floods resulting in localized crop losses. Subsequently, below-average precipitation prevailed for the remainder of the cropping period. The poor and erratic rains severely affected yields and cereal production is expected to be 20–40 percent below the average. In southeastern **Kenya**, the "long-rains" have been well below average throughout the cropping season, reducing crop yields. By contrast, in major growing areas of Central, Rift Valley and western provinces, "long-rains" crops, for harvest from September, benefited from abundant and well-distributed rains, following a late start of the rainy season, and vegetation conditions are currently above average. In bi-modal rainfall areas covering most of **Uganda**, average to above-average rainfall benefited first season crops, except in some northern and western parts where unfavourable seasonal rains are expected to cause localized crop production shortfalls and a delayed harvest. In the uni-modal rainfall Karamoja Region, where crops are usually gathered in August–September, the ongoing rainy season has been characterized by torrential rains in May which triggered floods and caused waterlogging, especially in Napak and Kotido districts. Replanting was constrained on account of households' low financial capacity to purchase seeds and the harvest is expected to be below average and delayed by one to two months. In **the United Republic of Tanzania**, the "Masika" harvest, gathered in northern and northeastern bi-modal rainfall areas,

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
East Africa	5.9	6.4	6.2	46.0	47.5	47.0	56.2	59.3	58.5	-1.4
Ethiopia	4.9	5.1	5.1	22.5	23.1	23.1	27.6	28.3	28.3	0.0
Kenya	0.3	0.3	0.4	4.0	4.4	4.4	4.4	4.9	4.9	1.2
Sudan	0.7	0.9	0.7	6.9	7.1	6.9	7.6	8.1	7.6	-5.8
Uganda	0.0	0.0	0.0	3.3	3.4	3.3	3.5	3.6	3.5	-3.0
United Republic of Tanzania	0.1	0.1	0.1	7.3	7.4	7.3	10.7	12.0	11.8	-1.6

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

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

and the major "Msimu" harvest, gathered in central and southern uni-modal rainfall areas, are estimated at above-average levels due to a favourable performance of seasonal rains. However, localized crop production shortfalls are expected in northeastern Arusha, Kilimanjaro and Tanga regions, due to delayed and below-average rains. In **Rwanda** and **Burundi**, the "2021B" season crops benefited from above-average precipitation amounts and crop production prospects are favourable.

In **Ethiopia**, **South Sudan** and **the Sudan**, cereal crops are at varying stages of development. In **Ethiopia**, planting of the 2021 main "Meher" season crops, for harvest from October, is well underway in key producing areas of western Oromia, western Amhara and Benishangul Gumuz regions. A timely onset of seasonal "Kiremt" rains in early June benefited plantings and germination. However, the ongoing conflict continues to severely disrupt agricultural operations in western, northwestern, central and eastern zones of the Tigray Region. In Southern Tigray, eastern Amhara, eastern Oromiya and northeastern SNNP regions, harvesting of the 2021 secondary "Belg" season crops started in July, one month later than normal, and cereal production is expected to be below average owing to unfavourable February–May rains. In the Southern Zone of the Tigray Region, agricultural operations have been affected by insecurity and input shortages caused by the ongoing conflict. In southern bi-modal rainfall areas of the Greater Equatoria Region of **South Sudan**, following a poor start to the rainy season, improved precipitation in May and early June boosted yield prospects, with crops to be harvested from July. In central and northern uni-modal rainfall areas, planting of the 2021 crops, for harvest from September, was completed in early June. Abundant early rains in May over most cropping areas benefited crop germination, but triggered floods in parts of Jonglei State. By contrast, in some areas of the eastern Greater Bahr-el-Ghazal Region, dry spells were reported during the second half of June. Although at the national level the scale of the conflict has diminished significantly , increased incidences of organized violence at the sub-national level since 2020, particularly in Jonglei State and neighbouring Pibor Administrative Area, but also in some areas of Central Equatoria, Upper Nile and Warrap states, continue to disrupt livelihood activities and agricultural operations. In **the Sudan**, planting of the 2021 crops, for harvest from October, is well underway, as the June–September rainy season started earlier in May. The planted area and yields are likely to be adversely affected by soaring prices of agricultural inputs, due to sustained inflation and dwindling foreign currency reserves that have lowered the national capacity to purchase imports. In addition, the removal of fuel subsidies in June will constrain farmers' access to fuel, especially in the semi-mechanized and irrigated sectors, and is also foreseen to result in a substantial increase in food production and transportation costs.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June–September rains are expected at above-average levels in **Ethiopia**, **Eritrea**, **the Sudan** and central and northern **South Sudan**, where they are the main rainy season. If these forecasts materialize, the favourable weather conditions will boost crop yields, but also increase the risk of flooding, especially in the low-lying and riverine areas of **South Sudan** and **the Sudan**.

Pastoral areas have been affected by two consecutive poor rainy seasons since October 2020. In **Somalia**, southeastern **Ethiopia** and northern and eastern **Kenya**, rainfall deficits in March and April caused a deterioration of rangeland resources to poor levels, resulting in livestock emaciation and a substantial decline in milk production. Heavy showers received in May had a positive impact on pastures, livestock conditions and milk production in some areas, but improvements were marginal and short–lived, and rangeland conditions entered the current dry season at below-average levels. These areas have also been affected by a severe locust upsurge since late 2019. Infestation levels in 2021 are significantly lower compared to the previous year, due to sustained control operations, carried out by the local governments with the support of FAO, and the severe dryness during the March–May rains in 2021, which constrained insect reproduction. Above-average precipitation amounts in early May in eastern Ethiopia and northern Somalia allowed the remaining swarms to mature and lay eggs. Despite the substantial decline in infestation levels in recent months, monitoring and control operations must be maintained to further reduce the number of locusts before they form a new generation of swarms from late June onwards. These swarms are expected to move to the Afar Region in northern Ethiopia for breeding in August and September, where forecasted above–average rains are expected to create conducive breeding conditions.

Prices of cereals remained at exceptionally high levels in the Sudan and South Sudan

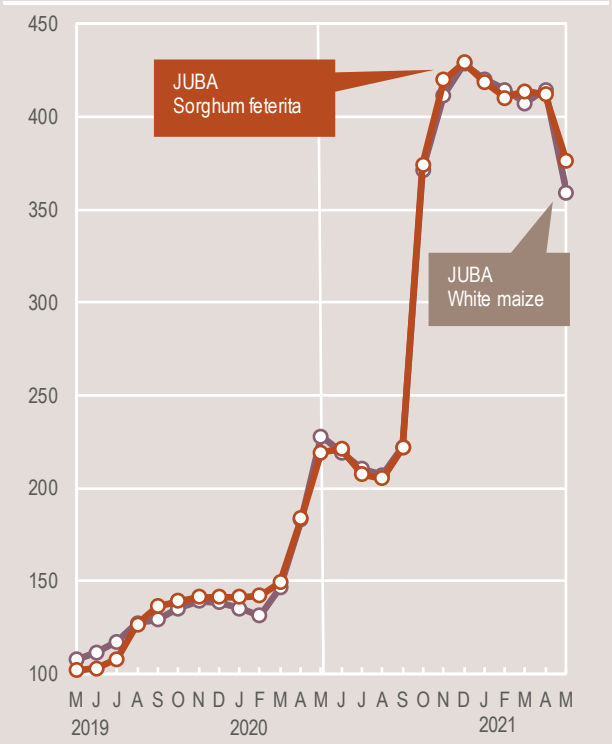
In **the Sudan**, prices of sorghum and millet declined in some markets by up to 15 percent between February and April as a devaluation of the Sudanese pound in late February substantially reduced the gap between the official and parallel exchange rates, easing inflationary pressure. Subsequently, prices resumed the upward trend, increasing by 5–15 percent in May, as the currency depreciated on the parallel market and reached exceptionally high levels. Similarly, in **South Sudan**, prices of sorghum and maize, which were stable in the first months of 2021, declined in May by about 10 and 15 percent, respectively, as a substantial devaluation of the South Sudanese pound on the official market resulted in an appreciation of the country's currency on the parallel market. However, May prices were still at exceptionally high levels, more than two times higher on a yearly basis, due to a difficult macro-economic situation, inadequate domestic supplies and the lingering impact of the prolonged conflict. In **Uganda**, prices of maize declined unseasonally by 20–30 percent between March and April, due to reduced exports to Kenya, its main export destination, where a temporary import ban was introduced in March due to concerns over the presence of mycotoxin in grains. Subsequently, prices increased by 5–15 percent in May, although remained lower on a yearly basis, as a spike in export demand in Kenya following the lifting of the import ban, which was replaced with enhanced food safety standards, exaggerated seasonal patterns. In **Somalia,** prices of maize and sorghum seasonally increased by 10–25 percent between January and May, when they were around the high levels of one year earlier, due to a below-average cereal production in 2020. In **Kenya**, prices of maize were mostly stable in recent months and in May were 10–20 percent lower than a year earlier due to adequate carryover stocks from

the above-average 2020 maize output. In **the United Republic of Tanzania**, prices of maize declined seasonally in May by 10–25 percent with the start of the major "Msimu" harvest and they were 20–30 percent below the year-earlier levels due to adequate domestic availabilities.

Alarming food security situation in several countries due to multiple shocks

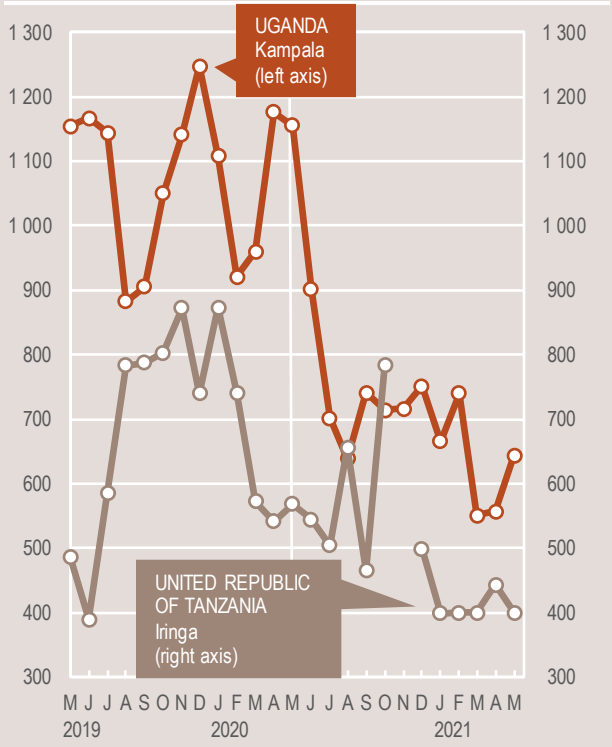
The aggregate number of people in need of humanitarian assistance is estimated at more than 42 million individuals, mainly located in **Ethiopia**, **South Sudan** and **the Sudan**. This number is more than 50 percent higher on a yearly basis and well above the high levels of food insecurity recorded during the 2016 and 2017 droughts. In **Ethiopia**, more than 16 million people are estimated to face severe food insecurity (IPC Phase 3: "Crisis" and above) between May and June 2021. Particular concern exists for populations in Tigray Region and neighbouring areas of Amhara and Afar regions, where 5.5 million people (about 60 percent of the population) are estimated to face severe food insecurity (IPC Phase 3: "Crisis" and above). Critically, this number includes 350 000 people in IPC Phase 5: "Catastrophe". The alarming situation is caused by the conflict that erupted in November 2020 and resulted in population displacements, livelihood losses, market disruptions and soaring food prices. In **South Sudan**, about 7.2 million people (about 60 percent of the total population) are estimated to face Phase 3: "Crisis" or worse levels of acute food insecurity between April and July 2021. The highest prevalence of food insecurity is reported Jonglei, Northern Bahr,el,Ghazal, Warrap states and in Pibor Administrative Area, where between 60 and 85 percent of the population is estimated to be severely food insecure, with a total of 108 000 people facing IPC Phase 5: "Catastrophe" levels of food insecurity. In **the Sudan**, 9.8 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between June and September 2021. The high prevalence of food insecurity is mainly due to flood-induced livelihood losses sustained in 2020, soaring food prices and inter-communal conflicts. In **Somalia**, about 2.8 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between April and September 2021, mainly as a result of the cumulative impact of poor October–December 2020 "Deyr" rains and April–June 2021 "Gu" rains, which severely affected crop and livestock production. Similarly, in **Kenya**, about 2 million people were estimated to be severely food insecure (IPC Phase 3: "Crisis" and Phase 4: "Emergency") in the March–May 2021 period, reflecting the poor performance of both the October–December 2020 "short-rains" and the March–May "long-rains" affecting northern and eastern pastoral, agro-pastoral and marginal agriculture areas.

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



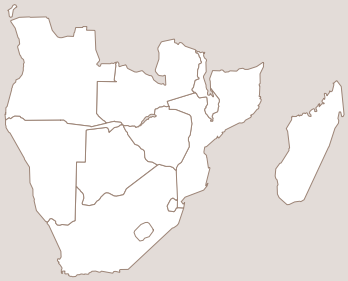
Source: Crop and Livestock Market Information System (CLIMIS).

Maize prices in selected East African markets
(Uganda Shilling/kg) (Tanzanian Shilling/kg)



Sources: Regional Agricultural Trade Intelligence Network.

SOUTHERN AFRICA



Record cereal harvest in 2021

Harvesting of the 2021 main summer cereal crops is almost complete, while the winter cereal crops are expected to be harvested between September and October. At the subregional level, cereal production is forecast at 40.6 million tonnes in 2021, about 22 percent above the five-year average and a new record high for the subregion. The large outturn reflects high crop yields and acreage increases instigated by remunerative grain prices and continued government support programmes that targeted smallholder farmers. Despite earlier concerns, the impact of the COVID-19 pandemic on agricultural production has been generally limited, but the lockdown measures did reportedly have more impacts further down the supply chain, particularly in the informal sector.

In **South Africa**, the leading grain producer in the subregion, cereal production is forecast at 19.5 million tonnes, the second largest harvest on record and 24 percent above the five-year average. The substantial output, which includes a forecast for the winter wheat crop, is primarily due to conducive weather conditions that pushed up cereal yields to above-average levels and a price-driven expansion in maize plantings, the main grain crop grown in the country. A significant increase in cereal production was also recorded in **Zimbabwe**, where the maize harvest increased to an above-average level of 2.7 million tonnes, nearly triple the level of the 2020 output. The country also recorded large production increases for other cereal crops, including sorghum and millet. The upturn in 2021 was driven by both yield and acreage increases, reflecting almost ideal weather conditions during the cropping season. Well above-average maize harvests were also gathered in **Malawi** and **Zambia**, estimated a 4.1 million and 3.6 million tonnes respectively, underpinned by conducive seasonal rainfall. Production upturns are also estimated in **Botswana**, **Eswatini** and **Namibia** in 2021, with domestic harvests exceeding the averages for a second consecutive year, while the cereal harvest in **Lesotho** recovered in 2021 following a below-average output in 2020. In southern regions of **Madagascar**, cereal production is expected to be well below average due to substantial rainfall deficits. However, weather conditions were more favourable elsewhere, notably in some of the main paddy producing regions, and therefore the 2021 national paddy production is estimated at an average level, albeit down from the large output of 2020. Similarly, central and southern provinces of **Angola** experienced significant rainfall deficits and high temperatures that had an adverse impact on crop and pasture production. The provinces most affected by the poor rains were Namibe, Huila, Huambo and Benguela, which combined produce about half of the national maize output, and therefore the 2021 national cereal production is forecast at a below-average level. The northern provinces of **Mozambique** were similarly affected by poor rains. In addition, the ongoing conflict in northern areas, principally in Cabo Delgado Province, caused the displacement of 732 000 people, as of May, and disruptions to agricultural activities. However, as weather conditions were generally beneficial elsewhere, cereal production for the country as a whole is estimated at a near-average level in 2021.

Reduced import needs in 2021/22 due to production upturns

Reflecting the large harvests in 2021, the overall subregional cereal

Table 10. Southern Africa cereal production

(million tonnes)

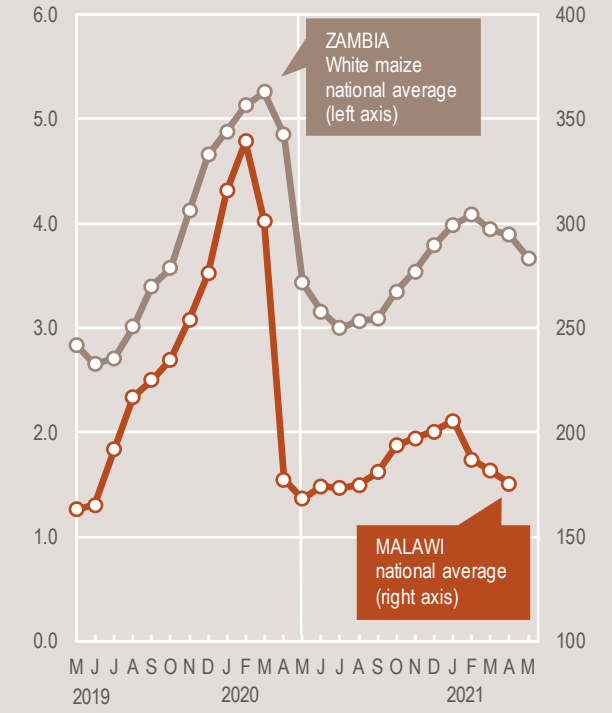
	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Southern Africa	2.1	2.5	2.4	27.0	30.7	33.5	4.2	4.9	4.7	33.3	38.1	40.6	6.4
excl. South Africa	0.3	0.4	0.4	13.1	14.0	15.9	4.2	4.9	4.7	17.6	19.2	21.0	9.4
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.7	4.2	4.0	3.9	4.5	4.2	-6.6
Malawi	0.0	0.0	0.0	3.3	3.9	4.3	0.1	0.1	0.1	3.4	4.0	4.4	9.7
Mozambique	0.0	0.0	0.0	2.4	2.5	2.4	0.4	0.5	0.5	2.8	3.0	2.8	-4.6
South Africa	1.8	2.1	2.0	13.9	16.8	17.5	0.0	0.0	0.0	15.7	18.9	19.5	3.4
Zambia	0.2	0.2	0.2	2.9	3.5	3.7	0.0	0.0	0.1	3.1	3.7	4.0	7.3
Zimbabwe	0.1	0.2	0.2	1.4	1.1	3.1	0.0	0.0	0.0	1.5	1.3	3.3	161.4

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

import requirement is estimated at a below-average level of 8.5 million tonnes in the 2021/22 marketing year (generally April/March). Wheat grain makes up for most of this quantity, followed by rice and then maize grain. Whilst most countries are expected to have lower import needs in 2021/22, notably **Zimbabwe**, cereal imports are foreseen to increase in **Angola** and **Madagascar** to cover the estimated supply shortages resulting from the reduced domestic harvests.

Export volumes, principally maize grain, are forecast to increase and remain at above-average levels in 2021/22. Most grain exports will originate from **South Africa**, where almost 3 million tonnes of maize are foreseen to be exported, mainly to countries outside the subregion in consideration of the large domestic cereal outturns in neighbouring countries. An increase in maize exports is also likely in **Zambia**, following the reduced levels in the previous two years that reflected tight domestic supplies due to the low harvests.

Maize prices in selected Southern African markets



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

Maize prices have generally declined despite currency weakness and rising international prices

Prices of maize decreased seasonally between April, the start of the harvest period, and June. However, increasing international prices and currency weakness in some countries contained seasonal declines and, in some cases, helped push up prices. In **South Africa**, following three months of declines on good supply expectations, there was a modest uptick in the wholesale price of maize in May, owing to spillover effects from the international market, where benchmark prices have been climbing in response to tightening global availabilities. The recent increase kept maize prices higher on a yearly basis. In import-dependent **Botswana**, prices of maize meal increased moderately between January and April 2021, and were higher on a yearly basis reflecting the elevated price levels in South Africa, the country's main source of grains. By contrast, prices in **Namibia**, which is also dependent on external grain supplies, have remained mostly stable. In **Malawi** and **Zambia**, prices of maize grain continued to fall seasonally in May and were close to the year-earlier levels, reflecting the effects of well above-average maize harvests. In **Zimbabwe**, the monthly food inflation rate continued to fall and, as of May, it was estimated at 1 percent. The annual rate remained at an elevated level of about 180 percent but is nevertheless significantly below the levels recorded in 2020, when it exceeded 900 percent. The comparatively low and stable price increases largely result from a more stable official exchange rate, which has remained steady since the end of 2020. In addition, the 2021 large cereal harvest will improve domestic supplies and help keep maize prices stable in the next months.

Food security expected to improve in 2021, with exception of areas in Angola, Madagascar and Mozambique

The number of food insecure people in the subregion was estimated at 24 million in the January–March 2021 period. Although up-to-date estimates for the remainder of 2021 are not yet available for all countries, in consideration of the large cereal outputs and therefore increased food availability, the overall prevalence of food insecurity is expected to decrease compared to the first quarter of 2021 and the previous year. However, levels of food insecurity are anticipated to remain generally high owing to the effects of the pandemic-associated economic downturns and the recent re-imposition of restrictive measures in some countries in response to a resurgence of COVID-19 cases, which are likely to continue to limit income-earning opportunities and constrain households' economic capacity to purchase food.

Notwithstanding the expected decline in the overall number of food insecure people, the severity of food insecurity is expected to worsen significantly in southern regions of **Angola** and **Madagascar** on account of the effects of weather-stricken harvests, which have adversely affected food availability and incomes. However, the most severe levels of food insecurity are expected in northern **Mozambique**, where the persisting conflict has disrupted livelihoods and agricultural activities and, as of May 2021, caused the displacement of 732 000 people from Cabo Delgado Province.

REGIONAL REVIEWS
ASIA

Unfavourable 2021 production prospects*

- **Afghanistan:** Adverse weather conditions
- **Syrian Arab Republic:** Adverse weather conditions
- **Turkmenistan:** Adverse weather conditions
- **Uzbekistan:** Adverse weather conditions

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

Source: GIEWS, 2021. *Crop Prospects and Food Situation #2* [online]. [Cited 8 July 2021], modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

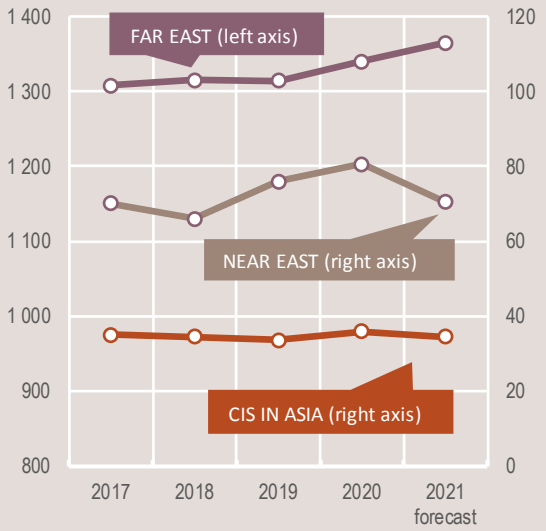
Asia Production Overview

Aggregate cereal production in Asia is forecast at 1 470 million tonnes in 2021, 3.4 percent above the five-year average and moderately higher than the previous year's outturn. The increase principally reflects favourable production prospects in the Far East, where the leading cereal producers of the subregion, China (mainland) and India, are forecast to register bumper outputs of maize and wheat, respectively. The large output in the Far East subregion is expected to more than offset production declines in countries in the CIS Asia region and the Near East.

In CIS Asia, unfavourable weather conditions and lower plantings are foreseen to instigate contractions in wheat harvests in 2021, but the overall output is expected to fall only slightly below the five-year average.

In the Near East, prolonged periods of below-average rainfall amounts resulted in dry conditions across many areas of the subregion, especially in Turkey, the most important regional grain producer. As a result, cereal harvests are forecast to fall to below-average levels in 2021.

Cereal production
(million tonnes)



FAR EAST

Cereal production prospects point to a new record output in 2021

Harvesting of the 2021 mostly irrigated wheat crop, planted last October/November, is nearing completion and the subregion's aggregate production is forecast at a record level of 275.5 million tonnes. In most countries, the outputs are forecast at bumper levels, mainly reflecting an expansion in the planted areas driven by strong domestic demand and high prices. Since October 2020, weather conditions have been generally favourable and, coupled with adequate supplies of agricultural inputs, have resulted in average to above-average yields. In **China (mainland)**, the 2021 wheat output is forecast at 136.4 million tonnes, slightly above the 2020 near-average output. In **India**, wheat production is estimated at an all-time high of about108.1 million tonnes, continuing the increasing trend that started in 2016, reflecting both a large area planted and high yields. In **Pakistan**, after three years of below-average outputs, the 2021 wheat production is estimated at an above-average level of 26 million tonnes, owing to area expansions in response to record domestic prices and government programmes promoting wheat production. In **Bangladesh**, **Nepal** and **the Democratic People's Republic of Korea**, the 2021 wheat outputs are forecast at above-average levels.

In Northern Hemisphere countries, land preparation and early planting of the 2021 main season rainfed crops, mostly rice and coarse grains, is underway, amid a timely onset of the monsoon rains at the beginning of June. The 2021 secondary crops will be planted towards the end of the year. The 2021 main season harvests in countries along or south of the Equator, namely **Indonesia**, **Sri Lanka, Timor-Leste** and **Viet Nam**, have recently concluded and farmers are currently engaged in planting activities of the 2021 secondary crops.

The subregion's aggregate 2021 paddy output is preliminarily forecast at about 692.8 million tonnes, slightly above the 2020 record level. The output mainly reflects expectations of an above-average planted area, amid continued government programmes that support paddy production, including the Government of **India**'s large-scale purchases at minimum support prices. In **China (mainland)**, the area sown in 2021 is forecast to remain close to the 2020 level. Above-average plantings are expected to result in bumper outputs in **Bangladesh**, **Pakistan**, while paddy harvests in **Indonesia**, **Malaysia**, **Thailand** and **Viet Nam,** are forecast close to or marginally above the five-year averages. In **Timor-Leste,** the 2021 main season (December to July) paddy crop was affected by floods, but increased plantings offset yield losses. According to a Crop and Food Security Assessment Mission fielded in the country from 29 April to 9 May 2021, paddy output in 2021 is forecast close to the five-year average. By contrast, in **Myanmar,** the 2021 paddy output is forecast to decrease to a below-average level, reflecting a likely reduction in the area planted.

The 2021 production of coarse grains, mostly maize, is forecast at an above-average level of about 396.5 million tonnes, mainly reflecting a widespread expansion in the planted area due to strong demand by the feed industry. In **China (mainland)**, the subregion's main producer of maize, the area planted is forecast to increase for the second consecutive year, mainly driven by strong domestic prices.

Above-average outputs are expected in **Bangladesh**, **India**, **Indonesia**, **Nepal**, **Pakistan, Sri Lanka** and **the Philippines**. By contrast, maize production is likely to continue to decline in **Viet Nam**, as farmers shift maize land to more profitable food crops, including vegetables.

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Far East	263.9	272.2	275.5	375.6	383.4	396.5	674.4	684.5	692.8	1 313.9	1 340.1	1 364.8	1.8
Bangladesh	1.2	1.0	1.3	3.3	4.0	4.7	53.9	56.1	56.8	58.4	61.1	62.8	2.7
Cambodia	0.0	0.0	0.0	1.0	0.9	0.9	10.7	11.1	11.3	11.6	12.0	12.2	1.7
China (mainland)	133.4	134.2	136.4	269.4	269.9	282.7	211.5	211.9	214.0	614.2	616.0	633.1	2.8
India	100.4	107.9	108.1	45.6	49.2	48.9	174.2	184.5	184.6	320.2	341.6	341.6	0.0
Japan	0.9	0.9	0.9	0.2	0.2	0.2	10.7	10.5	10.4	11.8	11.6	11.5	-0.8
Myanmar	0.1	0.1	0.1	2.5	2.9	2.8	26.1	25.1	24.9	28.7	28.1	27.8	-1.1
Nepal	2.0	2.2	2.1	2.9	3.1	3.1	5.4	5.6	5.6	10.4	10.9	10.8	-0.7
Pakistan	25.4	25.3	26.0	7.3	8.1	8.1	11.2	12.6	12.7	43.9	46.0	46.8	1.8
Philippines	0.0	0.0	0.0	7.8	8.1	8.1	19.0	19.7	19.9	26.8	27.8	28.0	0.7
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.2	4.7	5.1	5.4	4.9	5.3	7.6
Sri Lanka	0.0	0.0	0.0	0.3	0.4	0.4	4.1	5.1	5.2	4.4	5.5	5.6	1.1
Thailand	0.0	0.0	0.0	5.0	5.4	5.4	31.2	30.3	31.4	36.2	35.7	36.8	2.9
Viet Nam	0.0	0.0	0.0	4.9	4.6	4.6	43.2	42.7	42.9	48.2	47.3	47.4	0.3

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

Aggregate cereal import requirements in 2021/22 forecast at a near-record level

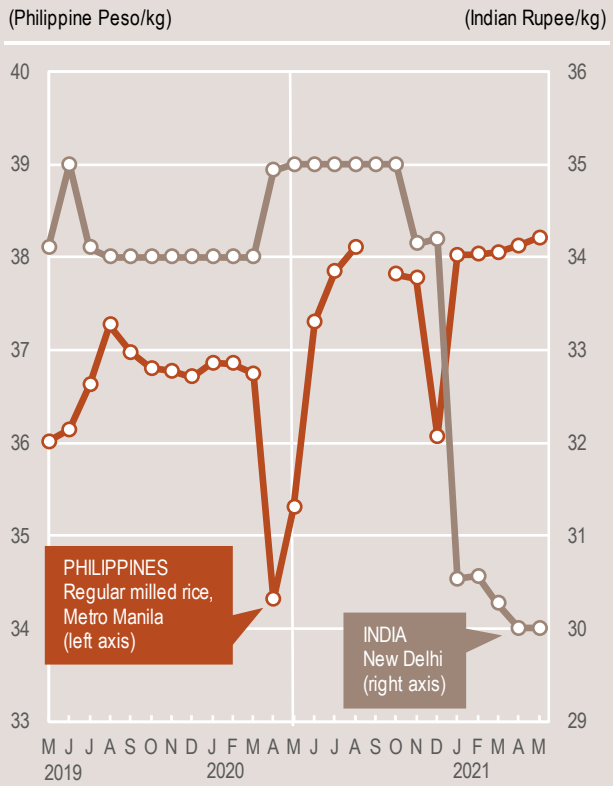
For the subregion as a whole, cereal import requirements in 2021/22 are forecast at 170 million tonnes (rice in milled terms), close to the previous year's record level and about 20 percent above the five-year average. The high level mainly reflects the strong demand for feed crops, especially in **China (mainland)** where pork production continues to recover following the outbreaks of African Swine Fever (ASF) in 2018 and 2019. Imports of maize by China (mainland) are forecast at about 24 million tonnes in the 2021/22 marketing year, close to the previous year's record level and more than double the five-year average. The subregional wheat import requirement in 2021/22 is estimated at an above-average level of 58.2 million tonnes, underpinned by the robust demand for food and feed. The largest increase in wheat imports is forecast in China (mainland) and **Bangladesh**. By contrast, below-average wheat imports are forecast in large importers, including **the Philippines**, **Thailand** and **Viet Nam**. Imports of rice in the 2021 calendar year are forecast at 13.8 million tonnes, up about 20 percent from 2020.

Aggregate rice exports in the 2021 calendar year are forecast at 40 million tonnes, about 8 percent above the previous year's level, mainly due to larger export quantities from **Cambodia**, **China (mainland)**, **India**, **Pakistan** and **Thailand**.

Domestic prices of rice generally stable or softened between March and May

Prices of rice were generally stable or softened in some countries between March and May, mostly reflecting good domestic availabilities from the ongoing or recently concluded harvests. In **Thailand**, prices decreased for the third consecutive month in May, weighed down by improved supplies from the 2020/21 secondary harvest and weak international demand. Prices generally decreased in **India**, reflecting good market availabilities from the above-average 2020/21 secondary "Rabi" crop. In addition, the release of government's stocks to support households affected by the COVID-19 pandemic supported the downward pressure. In **Viet Nam**, after steadily declining in the first four months of 2021, rice prices increased seasonally in May. In **China (mainland)**, rice prices were stable since March, owing to generally good market availabilities from the 2020/21 harvests. In importing countries, rice prices were stable in **the Philippines** as a result of adequate supplies from the recently concluded 2020/21 secondary paddy harvest and imports. In **Bangladesh**, rice quotations in Dhaka market were stable or slightly decreased with the start of the 2021 main "Boro" harvest and the sustained flows of imports. Prices of wheat grain and flour were generally stable in most countries, with the exception of **Pakistan**, where prices of wheat flour continued to increase in May reaching levels well above the same month a year

Rice retail prices in selected Far East countries



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

Table 12. Far East cereal production and anticipated trade in 2021/22

(thousand tonnes)

	5-yr Avg (2016/17 to 2020/21)	2020/21	2021/22	Change: 2021/22 over 2020/21 (%)	Change: 2021/22 over 5-yr avg (%)
Coarse grains					
Exports	*3 989*	*5 611*	*4 680*	*-16.6*	*17.3*
Imports	*73 673*	*102 929*	*99 979*	*-2.9*	*35.7*
Production	*375 645*	*383 394*	*396 537*	*3.4*	*5.6*
Rice (millled)					
Exports	*38 850*	*40 083*	*39 843*	*-0.6*	*2.6*
Imports	*13 734*	*13 759*	*11 302*	*-17.9*	*-17.7*
Production	*448 683*	*455 859*	*461 298*	*1.2*	*2.8*
Wheat					
Exports	*2 308*	*2 276*	*3 452*	*51.7*	*49.6*
Imports	*53 662*	*58 881*	*58 227*	*-1.1*	*8.5*
Production	*263 854*	*272 156*	*275 496*	*1.2*	*4.4*

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

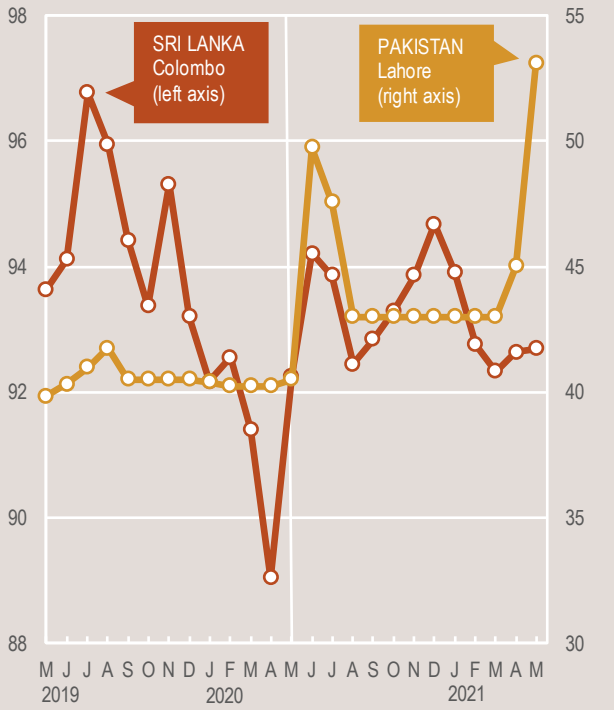
ago supported by strong domestic demand and reported delays in the transportation of wheat grain to wheat millers. In **China (mainland),** prices of wheat were generally stable in the March–May period, while wheat prices decreased marginally in **India** in May, under downward pressure from the recently concluded record-high 2021 harvest.

COVID-19 pandemic continues to affect food security of a large number of people

The COVID-19 pandemic continues to affect the food security situation of a large number of people, especially due to income losses, including a reduction of remittances, associated with the containment measures. For example, in **Nepal**, according to UNICEF, the COVID-19 pandemic has seriously affected child poverty; the estimated number of children living in poverty increased to 7 million in August 2020, compared to 1.3 million poor children before the pandemic. Severe food insecurity conditions persist among the large communities of refugees hosted in Pakistan and Bangladesh. In **Bangladesh**, the food security situation of about 860 000 Rohingya refugees and the host communities have severely deteriorated in 2021 compared to the pre-COVID-19 pandemic period. In **the Democratic People's Republic of Korea**, economic constraints, resulting from the global impact of the COVID-19 pandemic, have increased the population's vulnerability to food insecurity, with a large portion of the population already suffering from low levels of food consumption and very poor dietary diversity prior to the COVID-19 pandemic. As in preceding years, in **the Democratic People's Republic of Korea,** the total domestic utilization of cereals, soybeans and potatoes is estimated to exceed domestic availability of these foods, and the uncovered supply gap is estimated at about 880 000 tonnes. If this gap is not adequately covered through commercial imports and/or food aid, households could experience a harsh lean period, particularly from August until the 2021 main season crops are available for consumption in October.

Wheat flour retail prices in selected Far East countries

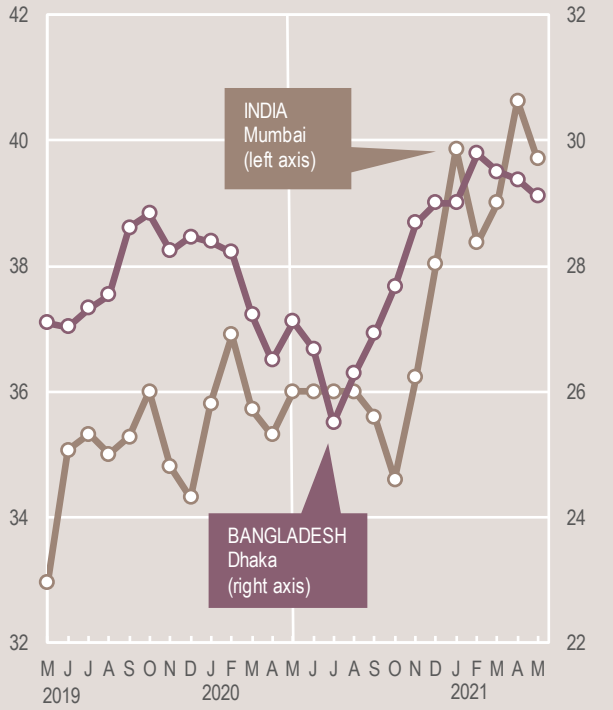
(Sri Lanka Rupee/kg) (Pakistan Rupee/kg)



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

Wheat flour retail prices in selected Far East countries

(Indian Rupee/kg) (Taka/kg)



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

NEAR EAST

Below-average 2021 cereal output expected as drought prevailed

Harvesting of the 2021 winter cereal crops began in May and is expected to conclude in July in most countries of the subregion. Spring cereals, planted between March and May, will be harvested from August.

Although the first substantial rainfall of the season did not occur until November 2020, it generally provided adequate moisture for sowing. However, below-average rainfall amounts in December resulted in dry conditions in many areas across the subregion, especially in **Turkey**, the most important regional grain producer. Rainfall resumed from mid-January onwards, reducing soil moisture deficits, albeit not uniformly across all cropping areas. As lack of rainfall continued with the progress of the season, large swathes of land across the subregion suffered from drought, particularly central **Turkey**, eastern parts of **the Syrian Arab Republic**, northern **Iraq** and northeastern **Islamic Republic of Iran**. Rainfed crops failed completely in the most important producing provinces in northwestern **Iraq** (Ninewa) and northeastern **Syrian Arab Republic** (Hassakeh). In **Afghanistan**, below-average precipitation amounts prevailed throughout most of the country. Lack of snow cover made crops susceptible to frost kill and limited the availability of irrigation water from melted snow for the summer crops, planted from February onwards. In **Yemen**, although weather conditions have been relatively favourable, the conflict continues to hamper agricultural activities by limiting the availability of inputs and constraining access to fields.

Total cereal production in 2021 is forecast at 70.4 million tonnes, about 13 percent below the previous year and about 3 percent down from the average. The year-on-year decrease of 10 million tonnes compared to the exceptional harvest of 2020 is on the account of the drought and resultant production declines. In **Iraq**, the 2021 cereal harvest is forecast at a close-to-average level of 5.8 million tonnes, about 34 percent below the previous year's output. Similarly, in **the Syrian Arab Republic**, a below-average harvest is expected as a result of the drought and the difficult socio-economic situation that has hampered agricultural activities. In **the Islamic Republic of Iran** and **Turkey**, the geographic extent of drought was quite limited. Authorities in **Turkey** put the 2021 cereal harvest at an average level of 35 million tonnes, about 5 percent below the 2020 level, while in the Islamic Republic of Iran the 2021 harvest is forecast at 20.9 million tonnes, about 6 percent below last year's average harvest. Finally, in **Afghanistan**, where structural issues, including the shortage of agricultural inputs, were exacerbated by poor rainfall, about 4.6 million tonnes of cereals are expected to be harvested, 20 percent below the previous year's harvest and 15 percent below average.

Subregional cereal import requirements in the 2021/22 (July/June) marketing year are forecast at 77.6 million tonnes, approximately 4 million tonnes above the previous year and about 8 percent above the five-year average. The wheat import requirement is estimated at 33.8 million tonnes, about 12 percent above the average import requirement in the previous year, supported by population growth and declining domestic production.

Large number of people remain food insecure

The food insecurity of a large number of people in the subregion shows no signs of improvement compared to the previous year due to persisting conflicts, economic downturns and reduced livelihood opportunities. In **Afghanistan**, between November 2020 and March 2021, about 13.15 million people (over two-fifths of the total population) were estimated to be facing severe acute food insecurity and required urgent humanitarian assistance, including 8.52 million people in IPC Phase 3: "Crisis" and 4.3 million people in IPC Phase 4: "Emergency". In comparison, 11.15 million were facing IPC Phase 3: "Crisis" or above between August and October 2020. In **Yemen**, despite the delivery of humanitarian assistance, the number of food insecure people is estimated to have increased between January and June 2021 from 13.5 to 16.2 million, including 11 million people in IPC Phase 3: "Crisis", 5 million in IPC Phase 4: "Emergency" and 47 000 people in IPC Phase 5: "Catastrophe". In **the Syrian Arab Republic**, a recent nationwide food security assessment indicates that about 12.4 million people (60 percent of the overall population) are food insecure, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and a rapidly worsening economy.

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Near East	45.2	49.0	42.7	22.3	25.6	21.9	5.3	6.0	5.9	72.8	80.6	70.4	-12.6
Afghanistan	4.4	4.7	3.7	0.4	0.4	0.3	0.6	0.7	0.6	5.4	5.7	4.6	-20.1
Iran (Islamic Republic of)	14.3	14.0	12.8	4.3	4.3	4.3	3.5	3.9	3.8	22.1	22.2	20.9	-6.0
Syrian Arab Republic	1.9	2.8	1.8	1.4	2.4	0.6	0.0	0.0	0.0	3.3	5.2	2.4	-53.8
Turkey	20.3	20.5	19.0	14.2	15.6	15.0	0.9	1.0	1.0	35.5	37.1	35.0	-5.4

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

CIS IN ASIA

Wheat production in 2021 forecast slightly below average

Harvesting of the 2021 winter cereal crops started in June and is expected to conclude by mid-August. In the eastern part of the subregion, scarce precipitation amounts during the season affected crops and, according to satellite-based imagery, vegetation conditions were below average in May, just before the harvest, particularly in southern **Turkmenistan** and central and southern **Uzbekistan**. By contrast, in Caucasian countries[3], weather conditions have been overall favourable and crop conditions in late May were reported to be good.

Planting of the 2021 spring cereals is virtually complete in the subregion and harvesting is expected to take place between August and September. In **Kazakhstan**, sowing of spring wheat, which accounts for about 95 percent of the annual domestic wheat output, took place under favourable weather conditions and the area planted is estimated at about 12 million hectares, slightly above the average level.

The 2021 subregional cereal output is forecast at a near-average level of 34 million tonnes. Wheat production, which accounts for about 70 percent of the total subregional cereal output, is expected at 24 million tonnes, 4 percent below the five-year average level. The anticipated outturn reflects expected reduced wheat outputs in **Turkmenistan** and **Uzbekistan**, following unfavourable weather conditions, and in **Armenia** and **Azerbaijan**, due to below-average planted areas. By contrast, a near-average wheat output is forecast in **Kazakhstan**, the main wheat producing country in the subregion, although recent drier-than-average weather conditions have slightly curbed yield prospects. Close-to-average outputs are also forecast in **Georgia**, **Kyrgyzstan** and **Tajikistan**. The 2021 subregional barley and maize outputs are expected at 5.6 million and 2.8 million tonnes, respectively, slightly above the five-year average levels mainly due to large plantings in **Azerbaijan** and **Kazakhstan**.

Above-average import requirements forecast in 2021/22

The subregional aggregate cereal import requirements are forecast at about 9 million tonnes in the 2021/22 marketing year (July/June), 8 percent above the five-year average, mainly due to large import demand for wheat expected from **Turkmenistan** and **Uzbekistan**, in consideration of the below-average wheat outputs expected in 2021. Total cereal exports from **Kazakhstan** are forecast at a near-average level of 9.2 million tonnes. Wheat exports are forecast at about 8 million tonnes, slightly above the average volume, reflecting the abundant wheat supplies from the large harvests obtained in 2020 and further bolstered by favourable production prospects for the 2021 crops.

Export prices of wheat flour stable, while domestic prices showed mixed trends

In **Kazakhstan**, export prices of wheat flour remained stable between September 2020 and May 2021, mainly due to the weak demand by importing countries. In May, wheat prices were about 12 percent below their levels a year before, underpinned by abundant supplies. The average domestic retail price of first grade wheat flour declined between December 2020

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
CIS in Asia	25.1	25.3	24.1	9.1	9.4	9.3	35.3	35.9	34.5	-4.0
Armenia	0.2	0.1	0.1	0.1	0.1	0.1	0.3	0.2	0.2	2.1
Azerbaijan	1.9	1.9	1.8	1.2	1.4	1.3	3.2	3.3	3.2	-2.0
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	-9.6
Kazakhstan	13.9	14.3	14.0	4.9	5.0	5.0	19.3	19.8	19.5	-1.6
Kyrgyzstan	0.6	0.6	0.6	1.1	1.2	1.2	1.8	1.9	1.9	-1.3
Tajikistan	0.9	0.8	0.8	0.4	0.3	0.4	1.3	1.3	1.3	2.3
Turkmenistan	1.3	1.5	1.1	0.1	0.1	0.1	1.5	1.7	1.3	-23.4
Uzbekistan	6.1	6.0	5.4	1.0	1.0	1.0	7.4	7.3	6.7	-8.2

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

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

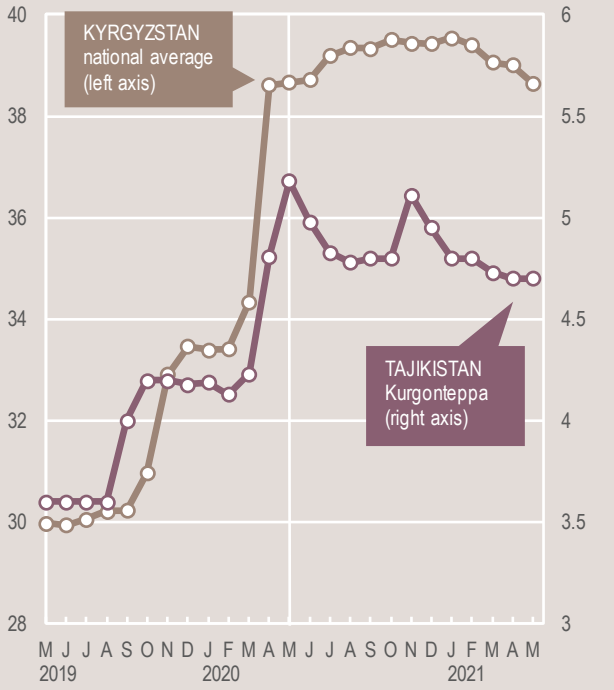
[3] Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

and February 2021, but increased in the following months to May, reaching a level 6 percent above its year-earlier value.

In the importing countries of the subregion, domestic retail prices of wheat flour have been generally stable in **Kyrgyzstan** and **Tajikistan**. In May 2021, although prices were close to year-earlier levels, reflecting satisfactory supplies from the near-average 2020 harvests, price levels remained generally high on account of the spikes recorded in 2020 in response to an upsurge in consumer demand triggered by the COVID-19 pandemic and supported by the depreciation of the domestic currencies. In **Armenia** and **Georgia**, prices of wheat flour were significantly higher on a yearly basis as of May 2021, reflecting high export quotations from the Russian Federation, the main wheat supplier to the two countries.

Retail wheat flour prices in selected CIS in Asia countries

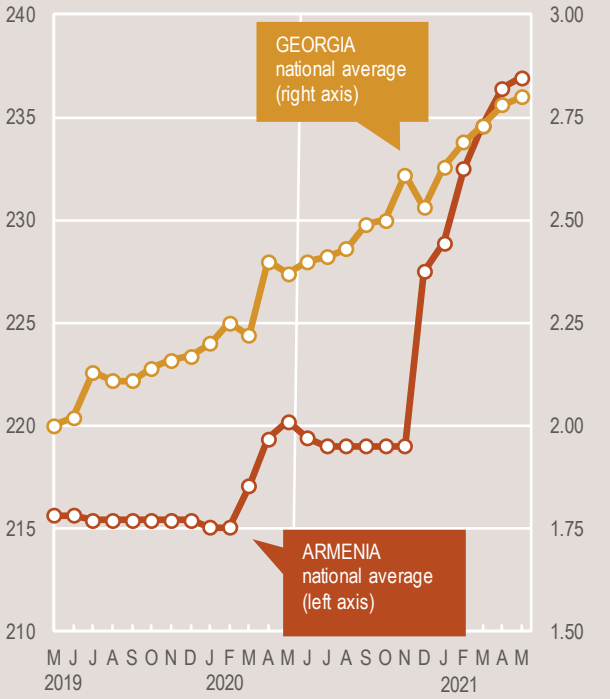
(Som/kg) (Somoni/kg)



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

Retail wheat flour prices in selected CIS in Asia countries

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



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

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

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

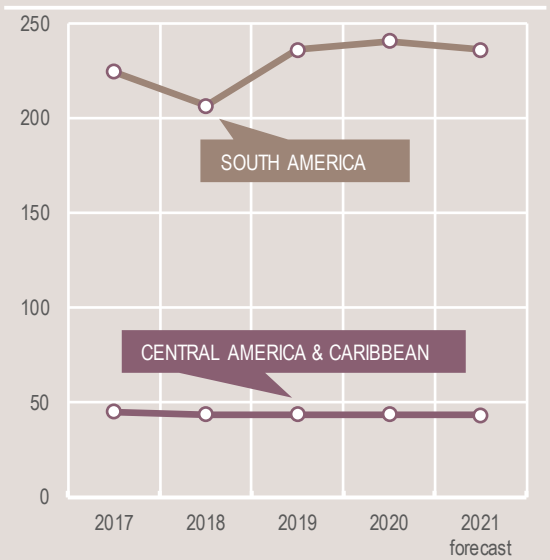
Source: GIEWS, 2021. *Crop Prospects and Food Situation #2* [online]. [Cited 8 July 2021], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean is preliminarily forecast at 279.5 million tonnes in 2021, close to the record level in 2020. The expected large outturn mostly reflects an all-time high maize acreage, spurred by remunerative domestic prices and strong export demand, which is anticipated to more than counter the effects of low yields in several countries. Subregional production prospects of winter wheat, which will be harvested at the end of the year, are uncertain despite the expected large acreage, as unfavourable rainfall forecasts could result in reduced yields.

In Central America, a slightly below-average cereal output is anticipated in Mexico as dry weather conditions caused crop losses in the minor season. Elsewhere in the subregion, the 2021 main season maize crop, to be harvested from September, is at the developing stage and the preliminary production forecast points to an average output in 2021.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat production forecast below average in 2021 due to low plantings

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2021 main winter crop, which accounts for 95 percent of the annual national output, is nearing completion. Above-average yields are expected, including in the main producing Sonora State, despite scarce precipitation earlier in the season. However, total wheat plantings in 2021, including an official forecast for the minor summer crop, are anticipated to be nearly 10 percent below the five-year average. As a result, and in spite of the anticipated high crop yields, the 2021 wheat production is forecast at a below-average level of 3.1 million tonnes.

Maize output in 2021 estimated slightly below the average

FAO's preliminary forecast for the subregional maize output stands at a slightly below-average level of 31.6 million tonnes in 2021. In **Mexico**, harvesting of the minor season maize crops is underway and production is expected at a below-average level, reflecting dry weather conditions in the first quarter of 2021 that caused significant crop losses in the minor producing Tamaulipas State. Planting of the main season crops started in April and production prospects are mostly favourable, based on the forecast of average to above-average rainfall amounts between July and September in the key producing central western region. In aggregate, Mexico's maize output in 2021 is forecast at a slightly below-average level of 27.1 million tonnes, owing to the expected reduction in the minor season harvest. Elsewhere in the subregion, the 2021 main season maize crop is currently at germination and early development stages. Early production prospects point to an average output in 2021 in **Guatemala** and **El Salvador**, as improved precipitation amounts since mid-June are likely to offset the negative impact of delayed planting activities caused by early season rainfall deficits. During the remainder of the season, weather forecasts point to average to above-average precipitation amounts in the third quarter of 2021, bolstering yield prospects. Although at the national level the production outlooks are generally favourable in **Honduras** and **Nicaragua**, in localized areas of central southern **Honduras** and northern **Nicaragua**, recent improved weather conditions may not be sufficient to restore soil moisture to normal levels following poor rainfall between May and mid-June, and this could result in low yields.

In **Haiti**, harvesting of the 2021 main season maize and paddy crops started in June and production is forecast at a below-average level due to low plantings, owing to prohibitively high cost and low supply of agricultural inputs. Following abundant seasonal rains in March and April that favoured crop emergence and development, precipitation amounts in May declined to below-average levels, curtailing yield prospects. In the July–September period, weather forecasts indicate a high likelihood of above-average rainfall amounts, which would be expected to reduce the soil moisture deficits and provide conducive conditions for the 2021 second season crops that will be planted in July and August. In **the Dominican Republic**, the aggregate paddy output in 2021, including an estimated above-average main season harvest, is forecast above the average driven by an area expansion.

Cereal imports forecast at high levels in 2021/22

During the last decade, cereal imports have been steadily increasing in the subregion, reflecting the growing demand for yellow maize by the feed industry and for wheat for human consumption. Cereal import requirements in the 2021/22 marketing year (September/August) are anticipated at a high of level of 37 million tonnes, with maize imports accounting for two-thirds.

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Central America and the Caribbean	*3.3*	*3.0*	*3.1*	*38.2*	*37.8*	*37.1*	*2.9*	*2.9*	*3.0*	*44.4*	*43.6*	*43.3*	*-0.8*
El Salvador	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*1.0*	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*1.0*	*1.1*
Guatemala	*0.0*	*0.0*	*0.0*	*2.0*	*1.9*	*2.0*	*0.0*	*0.0*	*0.0*	*2.0*	*2.0*	*2.1*	*3.7*
Honduras	*0.0*	*0.0*	*0.0*	*0.7*	*0.6*	*0.7*	*0.1*	*0.0*	*0.1*	*0.7*	*0.7*	*0.7*	*5.1*
Mexico	*3.3*	*3.0*	*3.1*	*33.3*	*33.1*	*32.3*	*0.3*	*0.3*	*0.3*	*36.9*	*36.4*	*35.8*	*-1.7*
Nicaragua	*0.0*	*0.0*	*0.0*	*0.5*	*0.4*	*0.5*	*0.4*	*0.4*	*0.4*	*0.9*	*0.8*	*0.9*	*3.2*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

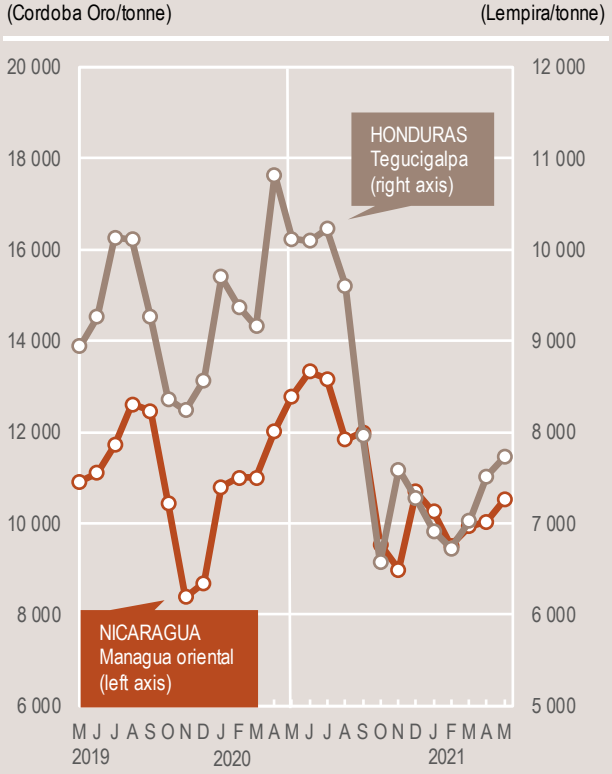
Prices of maize increased seasonally between March and May

In most countries of the subregion, prices of white maize increased in the March–May period, following seasonal trends, with the exception of **Guatemala** where prices declined in May as imports from Mexico boosted domestic supplies. As of May 2021, maize prices in **El Salvador**, **Guatemala**, **Honduras** and **Nicaragua** were lower year on year reflecting ample supplies from the 2020 harvests. During the March–May period, prices also increased in **Mexico** and were significantly higher on a yearly basis, reflecting trends in the international market and the impact of a below-average 2021 minor season output. Prices of black and red beans in the subregion were considerably lower between March and May 2021 compared to the same period in 2020, when they reached atypically high levels following an upsurge in consumer demand amid the first wave of the COVID-19 pandemic. In the March–May period, the commercialization of the "Apante" season harvest in **Nicaragua** led to a decrease in bean prices in domestic markets and also in the country's export markets, including **El Salvador**. In **Haiti**, prices of rice, which is mostly imported, generally increased from February to April 2021, reflecting a weakening of the national currency in 2021. Prices of locally produced maize meal also increased during the first four months of 2021 in line with seasonal trends. By contrast, prices of black beans were generally stable due to increased import quantities.

Food insecurity worsens due to income and livelihood losses amid the COVID-19 pandemic

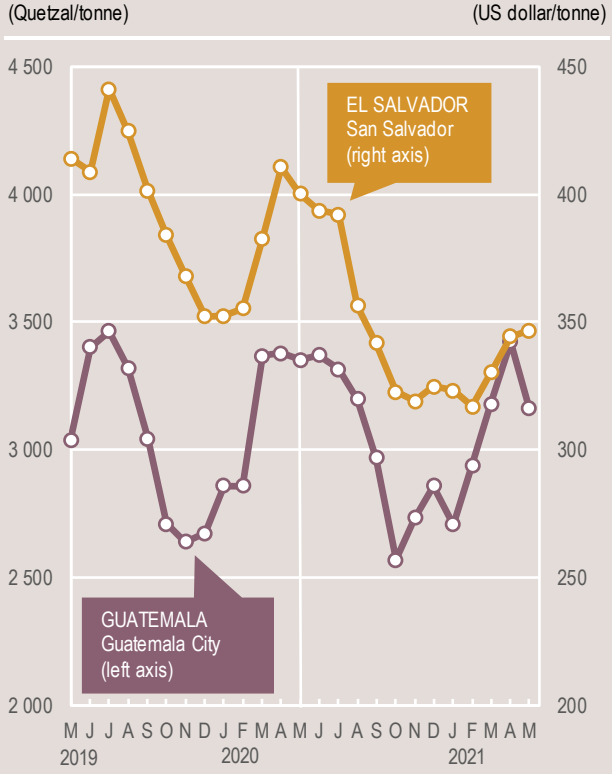
According to the latest IPC analyses, the number of food insecure people who require urgent humanitarian assistance until at least August is estimated at 3.5 million in **Guatemala**, 3.3 million in **Honduras** and 1 million in **El Salvador**, whilst in **Haiti**, about 4.4 million people were estimated to be food insecure in the March–June 2021 period. The economic downturn, due to the COVID-19 pandemic, and resultant losses of jobs, incomes and remittances exacerbated the previous levels of food insecurity across the subregion. In addition, vulnerable households in northern Honduras and eastern Guatemala are still recovering from livelihood losses caused by the passage of two hurricanes in November 2020. For Guatemala, the IPC analysis also included a projection of food insecurity for the September 2021–January 2022 period that points to a decline in the number of acute food insecure people to 2.5 million, down from 3.5 million. The projected improvement of the food security situation mainly reflects an expected increase in the availability of staple foods following the harvest of the main maize and minor bean crops next September, coupled with a modest recovery of economic activities following the removal of some COVID-19-related restrictions.

Wholesale white maize prices in selected Central America countries



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

Wholesale white maize prices in selected Central America countries



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

SOUTH AMERICA

Maize production forecast above the average in 2021

In South America, harvesting of the 2021 main season maize crop is underway in most countries, while the harvest was completed in **Chile** and **Uruguay**. The subregional maize output is forecast at 165 million tonnes in 2021, more than 8.5 percent above the five-year average, primarily due to large plantings. However, this year's output is still expected to fall below the level of the previous year, reflecting a decline in yields in some countries due to unfavourable weather conditions. The notable example is **Brazil**, where the main season crops were negatively affected by dry weather conditions between March and May in the key producing central and southern areas. Total maize production in Brazil is, however, still forecast at an above-average level of 93 million tonnes in 2021 on account of a record planted area, underpinned by high grain prices, which is anticipated to more than compensate for lower yields. In **Bolivia (Plurinational State of)** and **Peru**, maize outputs are forecast at below-average levels as unfavourable weather conditions caused a contraction in the areas sown and lowered yield expectations. In **Paraguay**, crops were affected by poor rainfall amounts in the March–May period, which coincided with the critical flowering and grain filling stages. However, the 2021 maize output is forecast to remain at a near-average level as robust export demand drove an expansion in plantings that is expected to partly compensate for reduced yields. Maize production in **Chile** is forecast to be significantly below the five-year average on account of near-record low plantings, as farmers continued to shift production away from maize to more profitable horticultural crops. By contrast, in **Argentina**, maize production is officially anticipated at a new peak of 59 million tonnes, supported by above-average yields, especially of the late-planted crops. The planted area is estimated at 9.5 million hectares, virtually unchanged from the record level in 2020, as farmers responded positively to strong export demand. In **Uruguay**, an all-time high maize acreage contributed to a record output in 2021. In the northern parts of the subregion, an average outturn is expected in **Ecuador** and a slightly above-average production is anticipated in **Colombia**, reflecting an expansion of plantings and favourable weather conditions.

Harvesting of the 2021 paddy crop concluded in **Brazil** and **Uruguay**, and harvests are estimated slightly above the five-year averages, as high yields are foreseen to more than compensate for a reduced sown area. In **Colombia**, where planting of the 2021 main crop was completed in May, the total sown area is estimated to have declined owing to low prices and ample domestic supplies. Similarly, in **Peru**, preliminary forecasts point to a decline in 2021 paddy sowings.

Forecasts of below-average rains dampen yields prospects of 2021 wheat crop

Planting of the 2021 wheat crop is ongoing in most of countries of the subregion. In **Argentina**, the leading producer of the subregion, plantings are officially estimated at a new record high of 6.95 million hectares, mainly as a result of strong export demand. Elsewhere in the region, the area planted was initially expected to increase in **Bolivia (Plurinational State of)**, **Brazil**, **Paraguay** and **Uruguay** on account of high prices, however, dry weather conditions in June hampered planting operations and this could result in smaller wheat acreages than initially expected. Production prospects are also uncertain as weather forecasts point to a high likelihood of below-average rains in the July–September period in key producing areas of central western Argentina, eastern Bolivia (Plurinational State of), southern Brazil, southeastern Paraguay and western Uruguay, with potentially negative consequences for crop yields.

Cereal exports forecast at high levels in 2021/22

Aggregate cereal exports in the 2021/22 marketing year (March/February) are forecast at an above-average level of 87 million tonnes. The large export forecast reflects expectations of bumper 2021 cereal outputs, strong export demand and weak currencies in

Table 16. South America cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
South America	28.0	27.8	30.0	165.3	188.1	181.1	24.5	24.9	25.1	217.9	240.8	236.2	-1.9
Argentina	18.7	17.6	19.2	56.6	65.5	67.8	1.3	1.2	1.4	76.6	84.3	88.4	4.8
Brazil	5.6	6.2	6.9	92.1	106.3	97.0	11.3	11.2	11.6	109.0	123.7	115.5	-6.6
Colombia	0.0	0.0	0.0	1.5	1.5	1.5	2.7	3.0	2.9	4.2	4.5	4.4	-1.9
Paraguay	1.1	1.3	1.2	5.5	5.9	5.6	1.0	1.2	1.1	7.6	8.4	7.8	-6.4
Peru	0.2	0.2	0.2	1.8	1.7	1.7	3.3	3.4	3.2	5.2	5.3	5.2	-3.0

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

Argentina and **Brazil** that have increased the competitiveness of local grains on the international market. However, the forecast is lower than the substantial volumes exported in the previous two marketing years, which reflects a likely fall in Brazilian exports due to the smaller domestic maize harvest. Overall, subregional maize exports are estimated at 68 million tonnes in 2020/21, about 13 percent above the five-year average.

Maize and wheat prices increased in the March–May period

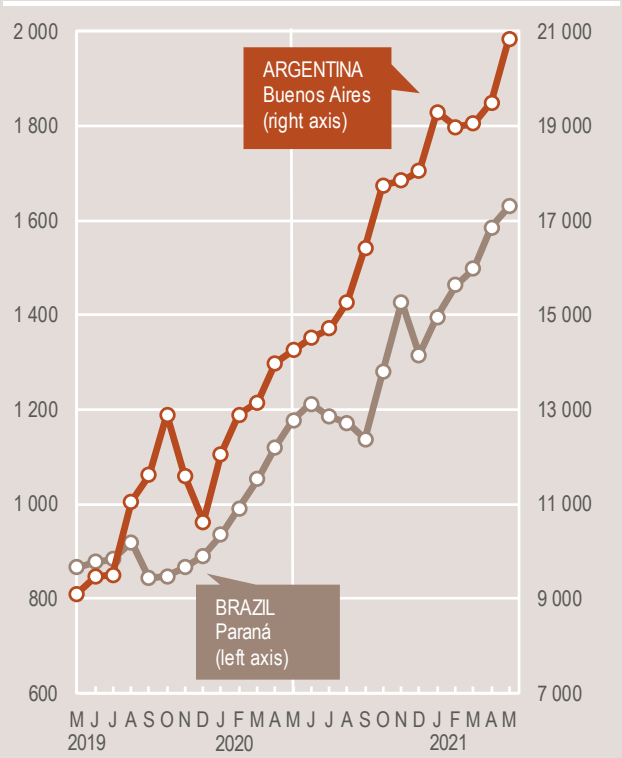
Prices of yellow maize increased between March and May 2021 in the key producing countries. In **Argentina**, despite favourable harvest expectations, prices increased on strong export demand and were higher on a yearly basis. In **Brazil**, concerns over the impact of dry weather conditions on 2021 crop yields exerted strong upward pressure on prices and combined with robust export demand prices were trending at higher year-on-year levels. In importing countries, **Colombia** and **Peru**, prices of maize increased during the March–May period in line with trends in the international market. Furthermore, in Colombia, the social unrest that disrupted trade and market activities exerted additional upwards pressure on prices in May. In **Chile**, maize prices were generally stable in the March–May period as the downward pressure from the 2021 harvest was limited by the high prices of imported grains. By contrast, in **Ecuador**, prices of yellow maize have decreased with the ongoing 2021 main season harvest, but they were higher on a yearly basis reflecting the below-average 2020 harvest.

Prices of wheat increased in the March–May period in **Argentina**, reflecting strong export demand that also contributed

Wholesale maize prices in selected countries in South America

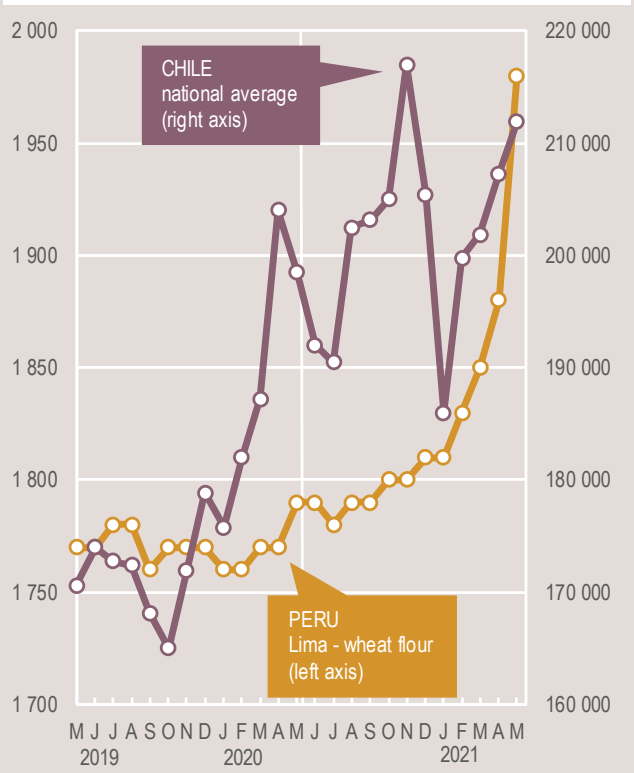
Sources : Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

Wholesale wheat prices in selected countries in South America



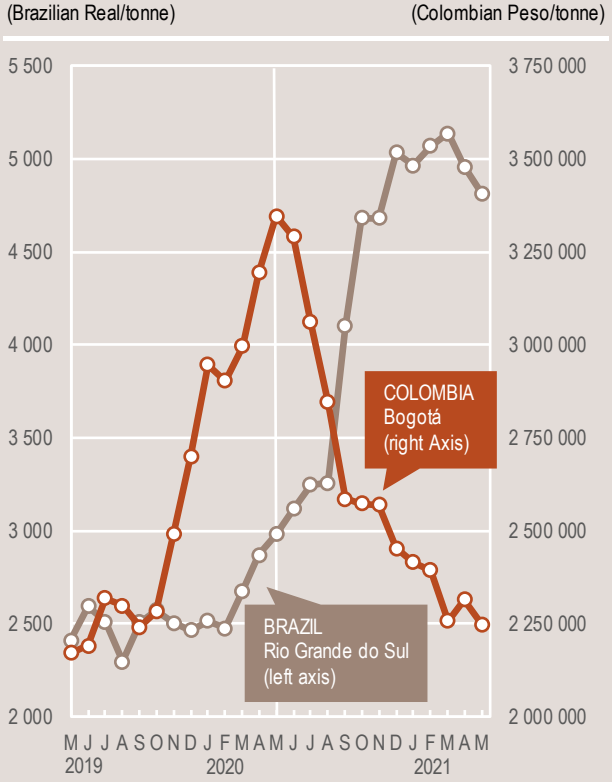
Sources : Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

Wholesale wheat prices in selected countries in South America



Sources : Ministerio de Agricultura y Riego, Peru; Cotrisa, Chile.

Wholesale rice prices in selected countries in South America



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

to keeping prices at higher year-on-year levels. In **Chile** and **Peru**, prices of wheat also increased during this period underpinned by increasing import costs. In **Colombia** and **Ecuador**, wheat prices were generally stable and close to their year-earlier levels.

With regard to rice, the arrival on markets of the newly harvested 2021 crops generally lowered prices between March and May. As of May 2021, prices were higher than a year earlier in **Brazil** and **Uruguay,** reflecting large export sales in 2020. By contrast, in **Colombia**, **Ecuador** and **Peru**, prices were lower year on year due to ample carryover stocks from the bumper 2020 harvests.

Food security of Venezuelan migrants expected to worsen

In **Venezuela (Bolivarian Republic of)**, the economy is forecast to contract for the eighth consecutive year. In response to the poor economic conditions, an estimated 5.6 million people (nearly 20 percent of the population) left the country during the last six years in search of income-earning opportunities and settled in neighbouring countries, mostly in Colombia (1.7 million), Peru (1.05 million), Chile (457 000) and Ecuador (430 000), as of early June 2021. Migration flows are likely to continue as a result of the negative effects of the COVID-19 pandemic that have compounded the already severe macro-economic crisis in the country. According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela, the number of Venezuelan refugees and migrants (including in-transit and temporary) in need of food assistance is estimated at about 3.26 million in 2021.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of June 2021
Territories/boundaries**

NORTH AMERICA

Canada
Maize: Planting
Small grains: Vegetative

United States of America
Maize: Vegetative
Small grains: Maturing to harvesting

EUROPE

Northern Europe
Small grains: Reproductive

Southern Europe
Maize: Vegetative to reproductive
Small grains: Maturing to harvesting

CIS in Europe:
Maize: Reproductive
Small grains: Maturing to harvesting
Wheat: Maturing to harvesting

OCEANIA

Australia
Cereals (summer): Vegetative
Cereals (winter): Planting

** See Terminology (*page 6*)

Source: GIEWS, 2021. *Crop Prospects and Food Situation #2* [online]. [Cited 8 July 2021], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

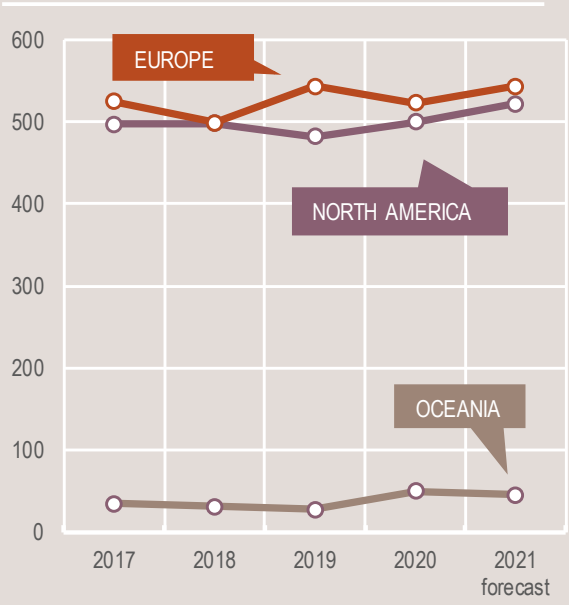
North America, Europe and Oceania Production Overview

In the United States of America, although total wheat production is forecast at a below-average level in 2021, it is foreseen to increase on a yearly basis reflecting a price-driven expansion in sowings and higher year-on-year yields. Maize production, with crops to be harvested from September, is anticipated at a bumper level, resting on favourable weather conditions that are expected to result in an upturn in yields. In Canada, cereal production in 2021 is forecast below the previous year, underpinned by reduced plantings.

In the European Union, production of wheat, the main winter crop, is forecast to recover in 2021 from the previous year's low level, while production of maize, the main summer crop, is expected to increase to an above-average level on account of a price-driven expansion in sowings and good weather conditions during the start of the season that have bolstered yield prospects. In the CIS countries in Europe, above-average cereal outputs are forecast in 2021, but whilst Ukraine is expected to register a yearly production upturn owing to large plantings, cereal production in the Russian Federation is forecast to fall year on year reflecting less favourable weather conditions early in the season.

In Oceania, a second consecutive above-average wheat crop is forecast to be harvested in Australia in 2021, owing to a high level of plantings. However, the 2021 output is foreseen to decline compared to the previous year's high level, as less-than-ideal weather conditions have cutback yield prospects.

Cereal production
(million tonnes)



NORTH AMERICA

High grain prices boost sowings and production prospects in the United States of America

In **the United States of America**, the 2021 wheat production is forecast at 51.7 million tonnes, slightly below the five-year average, but nearly 3 percent higher on a yearly basis. The foreseen growth is primarily based on a price-driven expansion in winter plantings, the first in three years, which is expected to more than compensate the likely area contraction of the minor spring crop, partly due to the effects of prevailing dry weather conditions. Crop yields are also forecast to increase in 2021 as recent rainfall mitigated the adverse effects of earlier drier-than-normal conditions in southern and central Plains. Production of maize, to be harvested from September onwards, is forecast at an above-average level of 384 million tonnes, about 7 percent higher than the outturn in 2020. The positive outlook is underpinned by an increase in plantings, although current estimates point to a smaller area than initially expected, and above-average yields pinned on favourable weather forecasts.

In **Canada**, harvesting of the 2021 minor winter wheat crop is ongoing. Aggregate production, including the main spring crop to be harvested between August and October, is forecast at 31 million tonnes, 12 percent below the previous year's near-record level and 4 percent below the five-year average. The foreseen decrease is due to an expected contraction in plantings, reflecting lower profit prospects and dry weather conditions in the main producing areas during the spring planting period between March and May 2021. Yields are expected at average levels. Planting of the 2021 maize crops is underway and production is forecast at a near-record level of 13.9 million tonnes, reflecting foreseen increases in plantings and yields.

EUROPE

EUROPEAN UNION

Cereal production to recover in the European Union in 2021

In **the European Union**, plantings of the 2021 spring cereal crops, mostly maize, was completed in May, while harvesting of the winter crops is underway and will conclude in August. Production of wheat, the main winter cereal crop, is forecast at 135 million tonnes, about 8 percent above the weather-reduced harvest in 2020. The expected increase reflects both a price-driven expansion in the wheat acreage and a foreseen upturn in yields, owing to generally beneficial weather conditions. Production of maize, to be harvested from September, is forecast at 70.9 million tonnes, nearly 10 percent above last year's near-average level. The good production

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
North America	85.2	84.9	82.7	407.7	404.7	430.1	9.4	10.3	9.2	502.4	499.9	522.0	4.4
Canada	32.5	35.2	31.1	27.6	29.8	30.3	0.0	0.0	0.0	60.0	64.9	61.4	-5.5
United States of America	52.8	49.7	51.7	380.2	374.9	399.8	9.4	10.3	9.2	442.4	435.0	460.7	5.9
Europe	257.2	253.7	267.4	259.2	265.6	272.5	4.0	4.0	3.9	520.5	523.3	543.8	3.9
Belarus	2.4	2.8	2.4	4.8	5.5	4.9	0.0	0.0	0.0	7.1	8.4	7.3	-12.9
European Union[1]	143.2	125.4	134.6	157.4	155.3	156.6	2.9	2.8	2.7	303.4	283.5	294.0	3.7
Russian Federation	78.4	85.9	82.0	41.9	43.1	42.9	1.1	1.1	1.1	121.4	130.2	126.0	-3.2
Serbia	2.7	2.9	2.7	7.3	8.6	8.2	0.0	0.0	0.0	10.0	11.4	10.9	-4.8
Ukraine	26.0	24.9	28.5	40.9	39.7	46.3	0.1	0.1	0.1	67.0	64.6	74.8	15.8
Oceania	24.2	33.8	30.4	14.5	16.3	14.8	0.4	0.1	0.5	39.1	50.2	45.7	-9.0
Australia	23.8	33.3	30.0	13.9	15.7	14.1	0.4	0.1	0.5	38.1	49.1	44.6	-9.1

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2016-2020 period.

[1] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

prospects are on account of an estimated expansion in the area sown, underpinned by remunerative prices and expected favourable rainfall conditions that will support good yields.

Wheat production in **the United Kingdom of Great Britain and Northern Ireland** is also forecast to rebound sharply, from 9.7 million tonnes in 2020 to 14.5 million tonnes in 2021, predominantly due to an increase in plantings. A large proportion of the 2021 wheat crops is reported to be in good to excellent condition, inferring an increased likelihood of high yields.

CIS IN EUROPE

Cereal production in 2021 forecast above average

Harvesting of the 2021 winter cereal crops, which account for about 60 percent of the total subregional output, started in July, while planting of the spring crops is almost complete. The early forecast of the 2021 aggregate cereal output is set at 211 million tonnes, 7 percent above the five-year average. The favourable production prospects rest on the expectation of large wheat and maize outputs. The subregional wheat production, combining winter and spring crops, is forecast at 114 million tonnes, 6 percent above the five-year average due to large outputs expected in the Russian Federation and Ukraine. Similarly, the subregional production of maize is preliminarily forecast at about 54 million tonnes, well above the average level.

In **the Russian Federation**, despite some adverse impacts of colder and drier-than-average weather conditions in late spring, abundant rainfall in May and early June increased soil moisture levels across most croplands, boosting yield prospects of winter crops and benefitting planting of spring cereals. As the total area planted with wheat, including winter and spring crops, is estimated at a record high of 30.5 million hectares, if weather conditions remain favourable for the remainder of the season, the aggregate 2021 wheat output is expected at about 82 million tonnes, 5 percent above the five-year average. Maize and barley outputs are also expected at above-average levels in 2021. As a result, total cereal production in the Russian Federation is forecast at about 126 million tonnes, 4 percent above the five-year average.

In **Ukraine**, wheat production is forecast at 28.5 million tonnes in 2021, 10 percent above the five-average due to large plantings and favourable weather conditions during the season. The maize output is tentatively forecast at a bumper level of about 36 million tonnes owing to large plantings, with the crop to be harvested from September. As a result, the total 2021 cereal output, including winter and spring crops, is expected at about 75 million tonnes, well above the average level. In **the Republic of Moldova**, the preliminary forecast for the 2021 aggregate cereal production is pegged at about 3.2 million tonnes, well above the previous year's level and 8 percent above the five-year average, as favourable weather conditions during the season are expected to lift yields compared to the 2020 drought-reduced levels. In **Belarus**, the 2021 total cereal output is foreseen at a near-average level of 7.3 million tonnes.

Above-average cereal exports forecast in 2021/22

Total subregional cereal exports in the 2021/22 marketing year (July/June) are forecast at 101 million tonnes, 9 percent above the five-year average. This is mainly due to the expectation of large subregional wheat and maize exports, forecast at 58 and 33 million tonnes, respectively. Owing to strong demand from importing countries and the expectation of large wheat outputs in 2021, wheat shipments from the Russian Federation and Ukraine are forecast at above-average levels of 39 million and 19 million tonnes, respectively. Similarly, maize exports are forecast at a well above-average level of 28 million tonnes in Ukraine, reflecting the country's already ample supplies and a likely bumper maize harvest in 2021. In the Russian Federation, maize exports are forecast at a near-average level of 4.5 million tonnes in 2021/22.

Wheat prices increased in May and were higher on a yearly basis

In **the Russian Federation** and **Ukraine**, export prices of milling wheat decreased by about 10 percent between February and April 2021, mainly due to the weak demand by importing countries. Prices increased by 7 percent in May over concerns over the impact of dry weather conditions in March and April on wheat production prospects in the United States of America and Europe, and reached levels about 20 percent higher than a year earlier.

In both countries, domestic wholesale prices of milling wheat decreased between February and April 2021 and increased in May, reflecting the prevailing trends in the international markets. In May, prices were above their year-earlier levels, particularly in **Ukraine**, reflecting the reduced harvest obtained in 2020.

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

Source : International Grains Council.

OCEANIA

Australian cereal production to decline in 2021, as yields expected to return to average levels

In Australia, planting of the 2021 wheat crop, the main winter cereal, is ongoing. The early production forecast is pegged at 30 million tonnes, 26 percent above the previous five-year average, but below the 2020 record due to an expected decline in yields from the highs of last year in the key-producing states of New South Wales, Victoria and South Australia, which together account for 60 percent of the national wheat output. Barley production is forecast at 10.4 million tonnes, about 3 percent below the previous five-year average, mainly reflecting a slight contraction in plantings and expected low yields.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2016/17 - 2020/21	2017/18	2018/19	2019/20	2020/21	2021/22
Ratio of world stocks to utilization (%)						
Wheat	*37.0*	*38.5*	*36.3*	*36.5*	*37.4*	*37.8*
Coarse grains	*25.5*	*27.6*	*26.0*	*24.2*	*22.5*	*22.6*
Rice	*35.6*	*35.3*	*36.9*	*35.7*	*35.3*	*35.3*
Total cereals	***30.6***	***32.1***	***30.9***	***29.7***	***29.0***	***29.0***
Ratio of major cereal exporters' supplies to market requirements (%)[1]	*119.6*	*123.0*	*116.9*	*118.7*	*115.6*	*115.7*
Ratio of major exporters' stocks to their total disappearance (%)[2]						
Wheat	*18.1*	*20.9*	*18.0*	*15.4*	*16.4*	*16.6*
Coarse grains	*14.5*	*15.8*	*16.1*	*14.6*	*11.0*	*12.8*
Rice	*21.8*	*18.1*	*22.5*	*24.5*	*25.0*	*26.0*
Total cereals	***18.1***	***18.3***	***18.9***	***18.2***	***17.5***	***18.5***

	Annual trend growth rate 2011-2020	Change from previous year 2017	2018	2019	2020	2021
Changes in world cereal production (%)	*1.8*	*1.1*	*-1.7*	*2.4*	*2.2*	*1.7*
Changes in cereal production in the LIFDCs (%)	*3.1*	*1.6*	*4.1*	*3.1*	*2.4*	*-2.1*

	2018	2019	2020	2021*	Change 2021* over 2020*
Selected cereal price indices[3]					
Wheat	*99.0*	*95.3*	*100.7*	*119.7*	*22.2%*
Maize	*99.1*	*94.6*	*100.8*	*143.7*	*55.3%*
Rice	*106.3*	*101.5*	*110.2*	*112.3*	*2.3%*

Source: FAO

Notes: Utilization is defined as the sum of food use, feed and other uses. Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

[1] Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America. Major coarse grains exporters are: Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America. Major rice exporters are: India, Pakistan, Thailand, the United States of America and Viet Nam.

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

[3] Price indices: The wheat price index is constructed based on the IGC wheat price index, rebased to 2014-2016 = 100; The coarse grains price index is constructed based on the IGC price indices for maize and barley and one sorghum export quotation, rebased to 2014-2016 = 100. For rice, data refers to the FAO All Rice Price Index, 2014-2016 = 100, which is based on 21 rice export quotations.

*January-June average.

Table A2. World cereal stocks

(million tonnes)

	2017	2018	2019	2020	2021 estimate	2022 forecast
TOTAL CEREALS	***828.8***	***862.5***	***837.4***	***822.7***	***815.9***	***835.5***
Wheat	***266.2***	***288.9***	***272.3***	***277.1***	***291.7***	***296.9***
held by:						
- main exporters[1]	*79.9*	*84.2*	*70.7*	*62.8*	*64.2*	*66.2*
- others	*186.3*	*204.7*	*201.6*	*214.3*	*227.5*	*230.7*
Coarse grains	***389.0***	***396.8***	***379.0***	***362.5***	***340.2***	***353.7***
held by:						
- main exporters[1]	*120.7*	*131.3*	*132.1*	*124.9*	*96.9*	*110.6*
- others	*268.3*	*265.5*	*246.9*	*237.6*	*243.3*	*243.1*
Rice (milled basis)	***173.7***	***176.8***	***186.1***	***183.0***	***184.0***	***184.9***
held by:						
- main exporters[1]	*33.2*	*32.3*	*39.5*	*43.5*	*46.4*	*48.6*
- others	*140.5*	*144.5*	*146.6*	*139.5*	*137.6*	*136.3*
Developed countries	***198.1***	***199.7***	***191.3***	***177.2***	***155.6***	***175.3***
Australia	*9.5*	*7.3*	*7.5*	*5.7*	*9.3*	*12.4*
Canada	*12.5*	*11.1*	*9.4*	*9.5*	*7.7*	*8.4*
European Union[2]	*35.2*	*45.3*	*44.4*	*44.6*	*35.6*	*39.8*
Japan	*6.6*	*6.7*	*6.5*	*6.8*	*7.1*	*6.8*
Russian Federation	*21.0*	*23.7*	*15.3*	*13.8*	*18.0*	*16.6*
South Africa	*1.8*	*5.1*	*3.6*	*2.6*	*3.9*	*4.8*
Ukraine	*8.4*	*8.0*	*7.2*	*4.8*	*6.1*	*9.1*
United States of America	*95.8*	*88.8*	*91.3*	*80.7*	*55.4*	*62.6*
Developing countries	***630.7***	***662.9***	***646.1***	***645.5***	***660.3***	***660.2***
Asia	***533.2***	***546.1***	***531.9***	***536.1***	***552.9***	***557.3***
China (mainland)	*393.0*	*401.0*	*385.6*	*381.9*	*385.4*	*390.5*
India	*35.5*	*43.5*	*51.7*	*58.6*	*63.5*	*64.8*
Indonesia	*9.2*	*10.2*	*11.5*	*9.0*	*7.7*	*8.0*
Iran (Islamic Republic of)	*11.6*	*10.6*	*9.1*	*9.9*	*11.5*	*10.7*
Korea, Republic of	*4.5*	*4.1*	*2.6*	*2.6*	*2.9*	*3.5*
Pakistan	*6.0*	*5.4*	*3.5*	*2.2*	*4.5*	*4.4*
Philippines	*3.7*	*4.1*	*4.8*	*4.0*	*3.9*	*4.0*
Syrian Arab Republic	*1.5*	*2.1*	*2.2*	*3.2*	*4.1*	*2.3*
Turkey	*6.0*	*7.1*	*6.6*	*10.1*	*11.5*	*11.8*
Africa	***58.5***	***64.0***	***64.3***	***60.7***	***61.6***	***60.6***
Algeria	*5.6*	*5.3*	*6.6*	*6.9*	*6.1*	*5.2*
Egypt	*7.4*	*6.9*	*5.1*	*5.3*	*5.4*	*5.3*
Ethiopia	*4.8*	*5.6*	*6.3*	*7.3*	*6.9*	*6.1*
Morocco	*5.9*	*6.7*	*7.3*	*5.8*	*4.8*	*6.5*
Nigeria	*5.8*	*5.2*	*5.0*	*4.7*	*4.6*	*4.2*
Tunisia	*1.0*	*1.1*	*1.0*	*1.2*	*1.0*	*1.1*
Central America and the Caribbean	***9.7***	***10.3***	***10.0***	***9.9***	***7.8***	***6.6***
Mexico	*6.5*	*7.7*	*7.6*	*7.4*	*5.7*	*4.7*
South America	***28.7***	***41.8***	***39.3***	***38.2***	***37.4***	***35.2***
Argentina	*7.4*	*12.3*	*12.6*	*12.7*	*11.4*	*10.9*
Brazil	*12.7*	*20.2*	*16.9*	*15.9*	*16.9*	*16.2*

Source: FAO

Note: Based on official and unofficial estimates. Totals computed from unrounded data. Stocks data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.

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

[2] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein[1]	US Soft Red Winter No.2[2]	Argentina Trigo Pan[3]	US No.2 Yellow[2]	Argentina[3]	US No.2 Yellow[2]
Annual (July/June)						
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
2017/18	230	188	203	159	165	174
2018/19	232	210	233	166	166	163
2019/20	220	219	231	163	163	163
2020/21	269	254	263	220	225	264
Monthly						
2019 - June	227	222	243	196	183	164
2019 - July	216	202	244	188	177	158
2019 - August	203	197	238	162	151	147
2019 - September	200	200	228	157	145	149
2019 - October	212	213	229	168	157	164
2019 - November	220	225	198	167	167	162
2019 - December	225	238	203	168	173	165
2020 - January	237	249	226	172	185	167
2020 - February	230	240	240	170	180	165
2020 - March	227	230	243	162	170	165
2020 - Aprill	232	222	244	145	155	165
2020 - May	223	211	239	144	146	176
2020 - June	216	200	241	149	149	173
2020 - July	220	210	244	151	153	180
2020 - August	221	207	240	148	163	195
2020 - September	246	220	246	166	185	217
2020 - October	273	245	257	187	217	236
2020 - November	275	250	259	193	226	247
2020 - December	267	249	269	199	232	253
2021 - January	291	280	282	233	257	286
2021 - February	291	278	272	246	248	300
2021 - March	274	274	267	246	236	314
2021 - April	281	278	267	266	253	310
2021 - May	298	294	280	304	272	323
2021 - June	285	263	274	295	252	309

Sources: International Grains Council and USDA.

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

[2] Delivered United States Gulf.

[3] Up River f.o.b.

Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2020/2021 or 2021

(thousand tonnes)

		2019/20 or 2020			2020/21 or 2021
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total imports (excl. re-exports)
AFRICA		***27 407.5***	***1 187.6***	***28 595.1***	***30 908.2***
East Africa		***11 148.4***	***813.0***	***11 961.4***	***12 350.0***
Burundi	Jan/Dec	*166.3*	*15.0*	*181.3*	*177.0*
Comoros	Jan/Dec	*63.3*	*0.0*	*63.3*	*66.0*
Eritrea	Jan/Dec	*458.5*	*0.0*	*458.5*	*459.0*
Ethiopia	Jan/Dec	*2 035.0*	*50.0*	*2 085.0*	*2 100.0*
Kenya	Oct/Sept	*3 578.0*	*80.0*	*3 658.0*	*3 689.0*
Rwanda	Jan/Dec	*222.3*	*0.0*	*222.3*	*225.0*
Somalia	Aug/Jul	*695.0*	*210.0*	*905.0*	*1 005.0*
South Sudan	Nov/Oct	*630.0*	*95.0*	*725.0*	*715.0*
Sudan	Nov/Oct	*1 865.0*	*330.0*	*2 195.0*	*2 366.0*
Uganda	Jan/Dec	*525.0*	*23.0*	*548.0*	*573.0*
United Republic of Tanzania	Jun/May	*910.0*	*10.0*	*920.0*	*975.0*
Southern Africa		***3 138.2***	***15.7***	***3 153.9***	***3 768.0***
Lesotho	Apr/Mar	*153.7*	*0.6*	*154.3*	*196.1*
Madagascar	Apr/Mar	*726.2*	*8.0*	*734.2*	*746.4*
Malawi	Apr/Mar	*141.2*	*3.0*	*144.2*	*214.5*
Mozambique	Apr/Mar	*1 550.9*	*1.0*	*1 551.9*	*1 804.9*
Zimbabwe	Apr/Mar	*566.2*	*3.1*	*569.3*	*806.1*
West Africa		***10 688.4***	***182.9***	***10 871.3***	***11 903.2***
Coastal Countries		***5 670.9***	***56.5***	***5 727.4***	***6 526.5***
Benin	Jan/Dec	*181.0*	*6.0*	*187.0*	*468.0*
Côte d'Ivoire	Jan/Dec	*1 830.0*	*5.5*	*1 835.5*	*2 235.5*
Ghana	Jan/Dec	*1 466.9*	*5.0*	*1 471.9*	*1 555.0*
Guinea	Jan/Dec	*917.0*	*5.5*	*922.5*	*857.5*
Liberia	Jan/Dec	*500.0*	*13.0*	*513.0*	*543.0*
Sierra Leone	Jan/Dec	*486.0*	*21.0*	*507.0*	*507.0*
Togo	Jan/Dec	*290.0*	*0.5*	*290.5*	*360.5*
Sahelian Countries		***5 017.5***	***126.4***	***5 143.9***	***5 376.7***
Burkina Faso	Nov/Oct	*743.0*	*9.0*	*752.0*	*772.0*
Chad	Nov/Oct	*163.0*	*41.6*	*204.6*	*219.6*
Gambia	Nov/Oct	*288.5*	*6.5*	*295.0*	*273.0*
Guinea-Bissau	Nov/Oct	*178.0*	*6.3*	*184.3*	*169.3*
Mali	Nov/Oct	*461.2*	*0.0*	*461.2*	*481.0*
Mauritania	Nov/Oct	*549.8*	*21.0*	*570.8*	*560.8*
Niger	Nov/Oct	*570.0*	*36.0*	*606.0*	*646.0*
Senegal	Nov/Oct	*2 064.0*	*6.0*	*2 070.0*	*2 255.0*
Central Africa		***2 432.5***	***176.0***	***2 608.5***	***2 887.0***
Cameroon	Jan/Dec	*1 339.9*	*10.0*	*1 349.9*	*1 540.0*
Congo	Jan/Dec	*289.0*	*2.0*	*291.0*	*349.0*
Central African Republic	Jan/Dec	*52.4*	*43.0*	*95.4*	*96.0*
Democratic Republic of the Congo	Jan/Dec	*730.0*	*120.0*	*850.0*	*880.0*
Sao Tome and Principe	Jan/Dec	*21.2*	*1.0*	*22.2*	*22.0*

Source: FAO

Note: The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2019); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2020/2021 or 2021

(thousand tonnes)

		2019/20 or 2020			2020/21 or 2021
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total imports (excl. re-exports)
ASIA		***22 607.8***	***881.0***	***23 488.8***	***25 745.3***
Cis in Asia		***4 682.3***	***0.0***	***4 682.3***	***5 104.5***
Kyrgyzstan	Jul/Jun	*631.4*	*0.0*	*631.4*	*615.5*
Tajikistan	Jul/Jun	*1 184.3*	*0.0*	*1 184.3*	*1 207.0*
Uzbekistan	Jul/Jun	*2 866.6*	*0.0*	*2 866.6*	*3 282.0*
Far East		***9 266.5***	***71.0***	***9 337.5***	***11 008.8***
Bangladesh	Jul/Jun	*7 797.7*	*69.0*	*7 866.7*	*8 602.0*
Democratric People's Republic of Korea	Nov/Oct	_*	_*	_*	*1 063.0*
Nepal	Jul/Jun	*1 468.8*	*2.0*	*1 470.8*	*1 343.8*
Near East		***8 659.0***	***810.0***	***9 469.0***	***9 632.0***
Afghanistan	Jul/Jun	*2 212.0*	*100.0*	*2 312.0*	*2 732.0*
Syrian Arab Republic	Jul/Jun	*2 442.0*	*285.0*	*2 727.0*	*2 470.0*
Yemen	Jan/Dec	*4 005.0*	*425.0*	*4 430.0*	*4 430.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 600.4***	***25.1***	***1 625.5***	***1 482.1***
Haiti	Jul/Jun	*848.2*	*25.1*	*873.3*	*797.1*
Nicaragua	Jul/Jun	*752.2*	*0.0*	*752.2*	*685.0*
TOTAL		***51 615.7***	***2 093.7***	***53 709.4***	***58 135.6***

Source: FAO

Note: The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2019); for full details see http://www.fao.org/countryprofiles/lifdc

* Estimates not yet available.

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