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

44

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 44 countries, including 33 in Africa, nine in Asia and two in Latin America and the Caribbean, are in need of external assistance for food. Conditions are projected to worsen significantly in West Africa, due to conflicts, high food prices and reduced harvests, while the situation is alarming in East Africa. Humanitarian needs are foreseen to also increase in Southern Africa in late 2022 due to the impact of adverse weather.

Asia	-0.1
Africa	+1.2
Central America and the Caribbean	+0.5
South America	-2.7
North America	+0.1
Europe	+4.1
Oceania	+7.3
World	**+0.7**

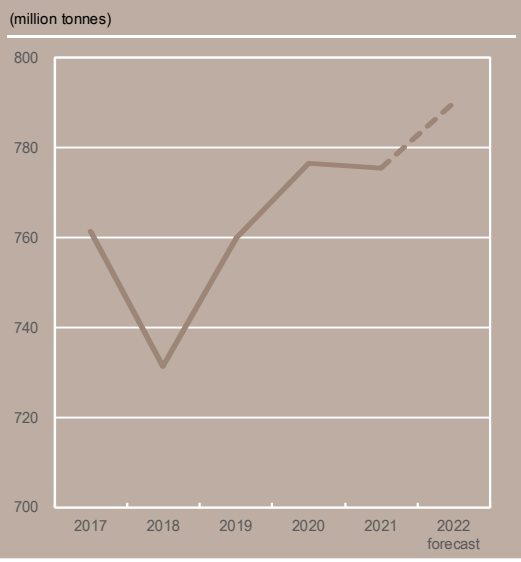
World cereal production 2021 over 2020

(yearly percentage change)

+0.7%

World wheat production 2022 over 2021

+1.9%



REGIONAL HIGHLIGHTS

AFRICA Adverse weather conditions in North Africa and Southern Africa have curtailed 2022 cereal production prospects. In East Africa and West Africa, where the 2021 crops were recently harvested, shortfalls in cereal production were registered in a number of countries due to poor rains and conflicts.

ASIA Dry weather conditions were present at the start of the season in Near East and Commonwealth of Independent States (CIS) Asian countries, and sustained conducive rains are needed to engender an improvement in crop conditions. Production prospects for the wheat crop are generally favourable in Far East Asia.

LATIN AMERICA AND THE CARIBBEAN In South America, all-time high maize plantings are foreseen to result in bumper coarse grain outputs in 2022. In Central America, 2021 cereal production is forecast at an average level, with generally early favourable conditions for the 2022 crop.

EUROPE The escalation of the conflict in Ukraine raises serious concerns over the impact on the country's food security situation, especially in urban areas. Population displacements and disruptions to public services and food supply chains would worsen food insecurity conditions, while damage to transport and storage infrastructure would have negative effects on the capacity to export grains.

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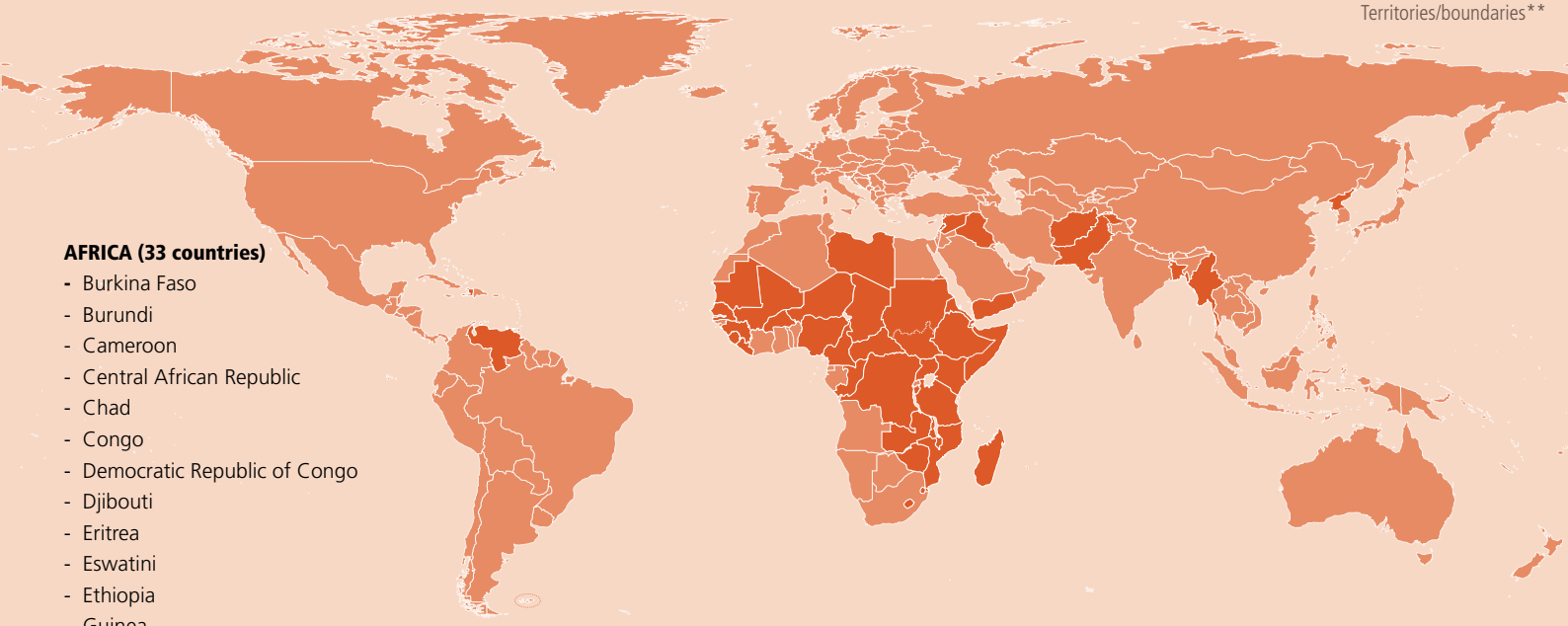
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of February 2022
Territories/boundaries**



** See Terminology (*page 6*)

Source: GIEWS, 2022. *Crop Prospects and Food Situation #1* [online]. [Cited 3 March 2022], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

AFRICA (33 countries)
- Burkina Faso
- Burundi
- 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)

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 (33 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people in IPC Phase 3 (Crisis) and above is estimated at 2.1 million between September 2021 and March 2022, mainly due to high levels of civil insecurity.

Kenya

Drought conditions

- About 3.1 million people were estimated to be severely food insecure in February 2022 reflecting consecutive poor rainy seasons since late 2020 that affected crop and livestock production, mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

Niger

Conflict, shortfall in cereal production

- According to the latest Cadre Harmonisé (CH) analysis, about 2.58 million people were assessed to need humanitarian food assistance between October and December 2021 due to an increase in security incidents that disrupted agricultural and marketing activities, diminishing households' livelihood opportunities.
- As of January 2022, an estimated 265 000 people have been displaced in Diffa, Tahoua and Tillabery regions due to the civil conflict. Furthermore, the country hosts 250 000 refugees, mainly from Nigeria and Mali. In addition, domestic cereal production was estimated at a below-average level in 2021, due to effects of adverse weather and the civil conflict, which is expected to further aggravate conditions. As a result, between June and August 2022, 3.64 million people are projected to face severe food insecurity.

Somalia

Drought conditions, civil insecurity

- An estimated 4.15 million people are facing severe food insecurity, IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) between February and March 2022, mainly as a result of consecutive poor rainy seasons since late 2020, which severely affected crop and livestock production, and due to heightened conflict since early 2021.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes

- About 1 million people are estimated to be severely food insecure between January and March 2022, due to livelihood losses and displacements caused by the rising water level of Lake Tanganyika and the overflow of rivers, sustained repatriation flows and the socio-economic impact of the COVID-19 pandemic.

Chad

Civil insecurity, shortfall in cereal production

- According to the latest CH analysis, about 965 000 people were estimated to be in CH Phase 3 (Crisis) and above, between October and December 2021 due to persisting insecurity in Lac and Tibesti regions that disrupted livelihood activities and caused population displacements.
- About 410 000 people were displaced due to insecurity in the Lake Chad Region as of January 2022. Furthermore, 560 000 refugees mostly from the Central African Republic, Nigeria and the Sudan reside in the country due to conflicts and require humanitarian assistance.
- Domestic cereal production was estimated at a below-average level in 2021 due to adverse weather and the civil conflict. As a result, between June and August 2022, 1.74 million people are projected to face severe food insecurity.

Democratic Republic of the Congo

Civil insecurity in eastern areas, economic downturn

- According to the November 2021 IPC analysis, 26 million people are projected to be severely food insecure, IPC Phase 3 (Crisis) and above between January and June 2022. This is due to persisting conflict in eastern provinces of North Kivu, South Kivu and Ituri, which continues to cause displacements, coupled with the economic effects of the COVID-19 pandemic.
- In addition, according to the first IPC Acute Malnutrition analysis conducted in the country, 857 000 children under the age of five were estimated to be acutely malnourished (IPC Phase 2 [Alert] or higher) between September 2021 and March 2022 in 70 out of 519 "health zones".

Djibouti

Floods, reduced incomes

- About 194 000 people were estimated to be severely food insecure between January and August 2021 mainly due to livelihood losses caused by floods and landslides, and as a result of the economic impact of the COVID-19 pandemic on the livelihoods of vulnerable households

Eritrea

Macroeconomic challenges have increased the population's vulnerability to food insecurity

Ethiopia

Conflict in the Tigray Region, drought conditions in southeastern areas, high food prices

- Approximately 18 million people are officially estimated to be food insecure. According to the 2021 Humanitarian Response Plan Mid-Year Review, without considering the conflict-affected Tigray region, about 12.8 million people are estimated to be in need of food assistance. Out of this figure, 3.9 million people are estimated to be food insecure in the drought-affected Somali region. In the Tigray region, according to the Revision of the 2021 Northern Ethiopia Response Plan, about 5.2 million people are facing severe food insecurity due to the impact of the conflict on livelihoods.

Nigeria

Conflict in northern areas, localized shortfalls in cereal production

- According to the latest CH analysis, about 12.9 million people were estimated to be in need of humanitarian food assistance between October and December 2021 owing to the conflict in northern states, localized shortfalls in staple food production, high food prices and reduced incomes. As of October 2021, over 3.2 million people were estimated to be internally displaced in northern states.
- Between June and August 2022, the number of food insecure is projected to increase to 18 million people, of which 620 000 are foreseen to face CH Phase 4 (Emergency) and 13 550 CH Phase 5 (Catastrophe).

South Sudan

Economic downturn, floods, civil insecurity

- 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, approximately 60 percent of the total population, were estimated to be severely food insecure between April and July 2021.
- Particular concern exists for households in Jonglei, Northern Bahr-el-Ghazal and Warrap states, and in neighbouring Pibor Administrative Area, where 60 to 85 percent of the population were 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, economic downturn, adverse weather conditions

- An estimated 3 million people are projected to be in need of humanitarian assistance between January and March 2022, largely on account of poor food access due to prevailing high food prices and reduced incomes owing to the effects of an economic downturn.
- Below-average rainfall and extreme weather events in 2021/22 are likely to result in a decrease in cereal production and heighten food insecurity later in 2022.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north, shortfall in cereal production

- According to the latest CH analysis, 1.65 million people were estimated to be food insecure and in need of humanitarian assistance between October and December 2021. In Centre-Nord and Sahel regions, insecurity continues to cause population displacements and, as of December 2021, about 1.6 million people had been displaced and required assistance. In addition, about 25 000 refugees, mostly from Mali, are residing in Sahel region.
- Domestic cereal production in 2021 was estimated at a below-average level due to effects of adverse weather and the civil conflict, further aggravating conditions.
- In the upcoming peak of the lean season, between June and August 2022, 2.6 million people are projected to face severe food insecurity, of which 435 000 people facing CH Phase 4 (Emergency).

A coup d'état on January 2022 is an additional factor that could increase civil insecurity and further stress food insecurity conditions.

Cameroon

Civil insecurity

- According to the October 2021 CH analysis, about 2.4 million people were estimated to be severely food insecure, CH Phase 3 (Crisis) and above between October and December 2021. This is mainly the result of conflict, sociopolitical unrest and the economic fallout from the COVID 19 pandemic.
- About 42 percent of the severely food insecure population are in Northwest and Southwest regions, and as of 31 January 2022, about 937 000 people were internally displaced in the country.

Congo

Refugee influx, floods

- As of 31 December 2021, about 28 900 refugees from the Central African Republic and 35 900 from the Democratic Republic of the Congo were residing in the country, mostly in Likouala and Plateaux departments. Host communities face food shortages and limited livelihood opportunities, and refugees' food security is essentially dependent on continued humanitarian assistance.
- On 29 November 2021, a state of emergency was declared due to floods in northern areas that caused crop and livestock losses, and displaced people, particularly in Likouala, Sangha, Cuvette and Plateaux departments. It is estimated that about 71 700 people have been affected, including refugees.

Eswatini

Economic downturn

- Nearly 336 000 people were assessed to be food insecure at least until March 2022, prior to the main harvest period, primarily due to food access constraints, underpinned by the negative effects of the COVID-19 pandemic on the economy.

Guinea

Reduced incomes

- About 565 000 people were estimated to be in need of food assistance between October and December 2021, primarily due to food access constraints on account of the effects of the COVID-19 pandemic. About 740 000 people are projected to face severe food insecurity in the upcoming June to August 2022 period.
- In addition, about 5 500 refugees, mostly from Côte d'Ivoire and Sierra Leone, are residing in the country.

Lesotho

Economic downturn

- The number of people facing IPC Phase 3 (Crisis) levels of food insecurity between January and March 2022 is estimated at 338 000, reflecting the effects of a slow economic recovery that has impinged on households' economic capacity to access food.

Liberia

High food prices, economic downturn

- According to the latest CH analysis, about 940 000 people were estimated to be in CH Phase 3 (Crisis) and above between June and August 2021 due to high food inflation rates and the negative effects of the COVID-19 pandemic on the economy. The country is also hosting approximately 8 000 refugees that require assistance.
- Production of rice, a main staple food, was estimated at a below-average level in 2021, a factor that is expected to further aggravate food insecurity in 2022.

Libya

Civil insecurity, economic and political instability, high food prices

- The 2022 Humanitarian Needs Overview states that 0.8 million people, 10 percent of the population, need humanitarian assistance, of which 0.5 million require food assistance, including internally displaced or migrants that are residing in or transiting through the country.

Madagascar

Extreme weather events

- An estimated 1.64 million people are food insecure in southern regions and require urgent humanitarian assistance due to successive years of droughts.
- Cyclones and tropical storms in early 2022 have affected a large number of people, particularly in eastern regions, and the number of food insecure people is expected to increase later in 2022. Moreover, drought conditions continue to affect households in the south, which is likely to result in an increase in the severity and prevalence of food insecurity in these areas.

Malawi

Economic downturn, reduced incomes

- An estimated 1.65 million people are facing IPC Phase 3 (Crisis) levels of food insecurity between January and March 2022, underpinned by localized shortfalls in cereal production and the lingering impact of an economic downturn due to the COVID-19 pandemic.
- The effects of poor rains at the start of the cropping season and tropical storm Ana in January 2022 are expected to cause an increase in humanitarian needs later in 2022, due to crop and livelihood losses.

Mali

Civil insecurity

- According to the latest CH analysis, about 1.17 million people were estimated to be in CH Phase 3 (Crisis) and above between October and December 2021 as a result of the escalation of the conflict, combined with the impacts of the COVID-19 pandemic and weather shocks.
- As of December 2021, about 350 000 people were internally displaced, mostly in central and northern parts of the country. In addition, the country hosts approximately 53 000 refugees, mostly from the Niger, Mauritania and Burkina Faso.
- Between June and August 2022, 1.84 million people are projected to face severe food insecurity, driven in part by a shortfall in staple food production in 2021. International sanctions imposed on the country, following the postponement of elections by the transitional military government, are likely to slow down economic activity and further weigh on households' economic capacity to access food.

Mauritania

Shortfall in agricultural production, reduced incomes

- According to the latest CH analysis, about 348 000 people were assessed to be in need of humanitarian assistance between October and December 2021 as a result of shortfalls in cereal and livestock production, and reduced incomes owing to the negative effects of the COVID-19 pandemic on the economy.
- About 75 000 refugees, mostly from Mali, also require humanitarian assistance.
- In addition, domestic cereal production declined in 2021 due to unconducive weather, which is likely to worsen conditions of the most vulnerable households. In the upcoming peak of the lean season, between June and August 2022, 660 000 people are projected to face severe food insecurity.

Mozambique

Localized shortfalls in food production, insecurity in northern areas, extreme weather events

- An estimated 1.9 million people require humanitarian assistance until at least March 2022, primarily due to shortfalls in food production and the impact of insecurity in the northern province of Cabo Delgado, where populations are experiencing the severest levels of acute food insecurity; approximately 24 000 people are facing IPC Phase 4 (Emergency) levels of food insecurity.
- Cyclones and tropical storms in early 2022 have affected a large number of people, particularly in central provinces, and the number of food insecure people is expected to increase in late 2022.

Namibia

Localized shortfalls in staple food production, economic downturn

- An estimated 750 000 people are projected to face IPC Phase 3 (Crisis) levels of food insecurity between December 2021 and March 2022, as a result of localized areas that suffered from poor harvests in 2021 and the negative effects of the COVID-19 pandemic, primarily through income and job losses that constrained households' access to food.

Senegal

Localized shortfalls in cereal production, reduced incomes

- According to the latest CH analysis, about 305 000 people were estimated to be in need of humanitarian assistance between October and December 2021, mostly on account of localized shortfalls in cereal production and reduced incomes owing to the impact of the COVID-19 pandemic. About 770 000 people are projected to face severe food insecurity between June and August 2022, reflecting persisting food access constraints.
- An estimated 14 500 refugees, mostly from Mauritania, require humanitarian assistance.

Sierra Leone

High food prices

- About 1.1 million people were estimated to be severely food insecure between October and December 2021 on account of high food prices and low purchasing power, resulting in acute constraints on households' economic access to food. About 1.45 million people are projected to face severe food insecurity in the upcoming June to August 2022 period.

Sudan

Conflict, civil insecurity, high food prices

- The number of severely food insecure people was estimated at 6 million between October 2021 and February 2022, mainly due to high food prices and intercommunal conflict.

Uganda

Weather extremes

- In Karamoja Region, about 188 000 people, 16 percent of the population, were estimated to be severely food insecure between August 2021 and January 2022, mainly a result of consecutive poor rainy seasons that adversely affected crop and livestock production.
- About 960 000 refugees from South Sudan and about 460 000 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 437 000 people were estimated to be in need of humanitarian assistance between November 2021 and April 2022, mainly located in northeastern Mara, Arusha, Kilimanjaro and Tanga regions, reflecting a reduced "Vuli" harvest due to poor rains.

Zambia

Reduced incomes, localized shortfalls in cereal production

- An estimated 1.58 million people are projected to need humanitarian assistance at least up until March 2022, down from 2 million assessed to be food insecure in the corresponding period in 2020/21. The overall large national agricultural output in 2021 helped to reduce the prevalence of food insecurity in early 2022, however, the effects of the COVID-19 pandemic, which have constrained households' economic access to food as well as localized shortfalls in crop production, have limited a larger improvement.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict, economic crisis

- The latest available nationwide food security assessment estimated that about 12.4 million people, 60 percent of the overall population, were food insecure in 2020, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and a rapidly worsening economy.
- Although some international food assistance is being provided, Syrian refugees are also pressuring host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, economic downturn

- A large portion of the population suffers from low levels of food consumption and very poor dietary diversity.
- Persisting economic constraints, exacerbated by restrictive measures to control the spread of the COVID-19 pandemic, have significantly reduced imports, including critical agricultural inputs and humanitarian goods, increasing the population's vulnerability to food insecurity.

Lebanon

Economic crisis

- In September 2021, the United Nations Economic and Social Commission for Western Asia estimated that, taking into account dimensions other than income, such as access to health, education and public utilities, 82 percent of the population lives in multidimensional poverty in 2021, up from 42 percent in 2019.

Yemen

Conflict, poverty, floods, high food and fuel prices

- The number of food insecure, IPC Phase 3 (Crisis) and above, was projected to increase by nearly 3 million people to 16.2 million between January and June 2021. 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

- The IPC latest analysis estimated that between November 2021 and

March 2022, the number of people in IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) at 22.8 million, up from 19 million in 2021 (September–October).

Bangladesh

Economic constraints, refugee influx

- Food insecurity as well as poverty levels have increased due to income losses caused by the effects of the COVID-19 pandemic.
- According to the latest figures (January 2022) from the United National High Commissioner for Refugees (UNHCR), about 921 000 Rohingya refugees from Myanmar were sheltering in the country, mainly in Cox's Bazar District.

Iraq

Civil conflict, economic slowdown

- The 2022 Humanitarian Needs Overview identified 2.5 million people in need of humanitarian assistance, of which 0.96 million have acute humanitarian needs. About 1.2 million Iraqis remain displaced by conflict.

Myanmar

Conflict, political instability, economic constraints

- The political crisis, following the military takeover on 1 February 2021, caused increased tensions and unrest throughout the country that resulted in new waves of population displacement. According to the latest figures (January 2022) from UNHCR following the military takeover, the number of additional displaced people is estimated at 440 000, adding to the existing 370 000 Internally displaced persons (IDPs), as of December 2020. Most of the IDPs reside in Rakhine, Chin, Kachin, Kayin and Shan states. The current uncertain political situation may further compromise the fragile conditions of vulnerable households and the Rohingya IDPs residing in the country.
- Income losses due to the impact of the COVID-19 pandemic have affected the food security situation of vulnerable households.

Pakistan

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

- The country hosts close to 1.4 million registered Afghan refugees (as of June 2021, UNHCR). Most of the refugees are in need of humanitarian assistance and have added pressure on host communities' limited resources. Following the Taliban's takeover of Afghanistan, this number reportedly increased by an additional 120 000 people.
- According to the latest IPC analysis, about 4.66 million people, 25 percent of the population, are estimated to be facing high levels of acute food insecurity, IPC Phase 3 (Crisis) and above, until at least April 2022 in 25 districts analysed in Balochistan, Sindh and Khyber Pakhtunkhwa provinces.
- Prices of wheat flour, the country's main staple, were at high levels in most markets in January 2022, constraining access to the staple 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 6.04 million people, with the largest populations located in Colombia (1.84 million), Peru (1.29 million), Ecuador (509 000) and Chile (448 000). Humanitarian needs for refugees and migrants are significant. According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela (R4V), the number of Venezuelan refugees and migrants (in destination) in need of food assistance is estimated at 3.5 million in 2022.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Reduced agricultural production, sociopolitical turmoil, natural disasters

- About 4.56 million people are estimated to be facing severe acute food insecurity and in need of urgent food assistance between March and June 2022. The high levels of food insecurity are the result of consecutive reduced cereal harvests between 2018 and 2021, and elevated food prices, exacerbated by sociopolitical turmoil. Two natural disasters (a 7.2 magnitude earthquake and a tropical storm) that struck in August 2021, destroyed productive assets and infrastructures, and caused losses of stored food, further aggravating conditions. The lack of income-earning opportunities amid worsening insecurity and difficult macroeconomic conditions is likely to heighten food insecurity.

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 current conditions indicate a high likelihood that cereal production would fall below 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):
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

Global cereal stocks in 2021/22 seen up; early prospects point to higher cereal production in 2022

FAO's latest forecast for world cereal **production** in 2021 has been raised by 2.2 million tonnes compared to the figure in February and is now pegged at 2 796 million tonnes, 0.7 percent higher on a yearly basis.[1] This upward revision stems from higher estimates for world maize and rice production, while the global production estimate for sorghum has been lowered, moderating the expected monthly aggregate upturn. Incorporating these changes, the global coarse grains production forecast now stands at 1 501 million tonnes, 1.2 percent higher year on year. The bulk of the increase rests on higher maize production in the European Union and India, which more than offsets the estimated low coarse grains production in the Sudan. The forecast for world wheat production remains unchanged on a monthly basis month at 775.4 million tonnes, reflecting an increase in Australia's output, reinforcing the record level, which was counterbalanced by minor downgrades to the estimates for the European Union, Iraq and Paraguay. Following a 2.2 million tonne upward revision, world rice production in 2021 is now anticipated to reach 519.3 million tonnes, up 0.7 percent from 2020 and marking a new peak. Compared to February's expectations, the increase primarily mirrors more buoyant output prospects for India, where official assessments indicate a record main-crop harvest attained this season. This revision, alongside an upward adjustment to Madagascar's output estimate, overshadows a downgrade for the United Republic of Tanzania.

Table 1. World cereal production

(million tonnes)

	2019	2020	2021 estimate	Change: 2021 over 2020 (%)
Asia	1 199.3	1 229.1	1 227.4	-0.1
Far East	1 092.8	1 114.8	1 137.7	+2.1
Near East	73.4	78.9	58.7	-25.6
CIS in Asia	33.1	35.4	31.0	-12.6
Africa	190.8	200.7	203.1	+1.2
North Africa	33.1	31.5	37.7	+19.5
West Africa	65.7	66.9	64.8	-3.2
Central Africa	7.1	6.9	7.0	+0.8
East Africa	56.2	58.9	53.4	-9.3
Southern Africa	28.6	36.4	40.2	+10.3
Central America and the Caribbean	42.5	42.6	42.8	+0.5
South America	228.4	232.5	226.1	-2.7
North America	479.7	495.2	495.9	+0.1
Europe	542.3	524.8	546.5	+4.1
European Union[1]	324.1	285.6	297.5	+4.2
CIS in Europe	202.7	204.1	211.5	+3.7
Oceania	28.6	50.2	53.8	+7.3
World	2 711.5	2 775.1	2 795.6	+0.7
Developing countries	1 652.1	1 696.2	1 690.6	-0.3
Developed countries	1 059.4	1 078.9	1 105.1	+2.4
- wheat	759.9	776.6	775.4	-0.1
- coarse grains	1 448.6	1 482.7	1 500.9	+1.2
- rice (milled)	503.0	515.7	519.3	+0.7

Notes: 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.

The forecast for global cereal **utilization** in 2021/22 has been lowered to 2 802 million tonnes, 3.5 million tonnes down from what was reported in February and 1.5 percent (41 million tonnes) above the 2020/21 level. The bulk of this month's downward revision is due to a 3-million-tonne reduction in global wheat utilization, mostly on lower-than-anticipated use in India on expectation of higher exports. Nonetheless, wheat utilization is still forecast to increase year on year by 1.5 percent, to 772.8 million tonnes driven primarily by an expected greater food consumption. Similarly, 2021/22 global coarse grains utilization has been scaled down marginally since the previous forecast, to 1 509 million tonnes, reflecting slightly lower feed use expectations, but it is still seen increasing by 1.4 percent from the 2020/21 level. FAO's forecast of world rice utilization in 2021/22 has undergone only minor changes since February, continuing to point to a 1.7 percent year-on-year expansion to reach a record high of 520 million tonnes.

Following a month-to-month 11.6 million tonne upward revision, global cereal **stocks** ending in 2022 are now forecast to increase marginally (0.5 percent) from their opening levels to reach 836 million tonnes. Based on the latest forecasts, the world cereal stocks-to-use ratio in 2021/22 would stand at 29.1 percent, down slightly from 29.7 percent in 2020/21 and marking a eight-year low, but still indicating an overall comfortable supply level. A higher estimate of wheat inventories in the European Union, due to an upward historical production revision and lower expected exports, is primarily behind a 3.6 million tonne upward adjustment to global wheat stocks this month, now forecast at 291 million tonnes, up 1 percent above opening levels. Global coarse grains stocks have also been lifted by 4.7 million tonnes, stemming almost entirely from higher global maize stocks in India and the European Union as a result of higher production estimates. An upgrade to anticipated reserves held by India has raised FAO's forecast of world rice stocks at the close of the 2021/22 marketing season by 3.2 million tonnes above February's expectations to 190.9 million tonnes, which is 0.9 percent above the 2020/21 high.

FAO's forecast for world **trade** in cereals in 2021/22 has been raised month-on-month to 484 million tonnes, up 2.7 million tonnes from the previous forecast and 0.9 percent (4.5 million tonnes) above the 2020/21 level. This forecast does not yet assume potential impacts of the conflict in Ukraine on trade flows from Ukraine and the Russian Federation. For the remainder of the 2021/22 season (1 March–30 June), Ukraine is forecast to export approximately 6 million tonnes of wheat and 16million tonnes of maize, while the Russian Federation is forecast to export approximately 8 million tonnes of wheat and 2.5 million tonnes of maize. FAO is closely monitoring the developments and will assess the impacts on the 2021/22 global cereal trade in due course. World wheat trade in 2021/22 (July/June) is currently forecast at a record 194 million tonnes, 2.5 percent (4.8 million tonnes) above the 2020/21 level. This reflects an increase of 1.1 million tonnes since the previous report on stronger than earlier-expected demand from Kazakhstan and Saudi Arabia. On the export side, record harvests are seen supporting greater-than-previously anticipated sales by India and Australia. The coarse grains trade forecast for 2021/22 (July/June) has also been lifted by 1.4 million tonnes since the previous report, but it is still forecast to contract by 0.9 percent (2.1 million tonnes) from the 2020/21 level, reaching 237 million tonnes. The contraction is primarily driven by an expected 1.7 percent decline in global maize trade. Ample exportable availabilities and an intensification of demand, especially from African and Near East Asian buyers, are forecast to sustain a third successive annual expansion in international trade in rice in 2022 (January–December) to 53.4 million tonnes.

Early outlook for 2022 crops

Looking ahead to the 2022 world cereal outturn, FAO's preliminary forecast for global wheat production points to a fourth consecutive annual increase to 790 million tonnes. The bulk of the growth is expected to originate in North America. In both Canada and the United States of America, price-driven area expansions and a foreseen upturn in yields underpin prospects of year-on-year production gains that would put the 2022 outturns above the previous five-year averages. Mixed outcomes are anticipated in Europe. In the Russian Federation, an improvement in weather conditions following early seasonal dryness is likely to foster a yearly increase in yields and, provisionally, production in 2022 is forecast at 82 million tonnes. A contraction in the wheat planted area in Ukraine is foreseen to result in a production decline this year; nonetheless, the outturn in 2022 is still forecast to remain slightly above the five-year average. This preliminary forecast does not consider the impacts of the conflict. In the European Union, where plantings are estimated to remain almost unchanged on a yearly basis, wheat production is tentatively pegged to fall marginally to 133 million tonnes, due to an expected reduction in yields following the highs registered in 2021. Wheat production in the United Kingdom of Great

Britain and Northern Ireland is forecast to remain unchanged from the previous year, as the effects of a slightly enlarged sown area are likely to be offset by a downturn in yields, keeping the national output at about 14 million tonnes. In Asia, small production increases are forecast in India and Pakistan, underpinned by continued supportive government policies and remunerative prices that are estimated to have maintained a high level of sowings. Wheat crop conditions in China (mainland) are also favourable and production in 2022 is expected to surpass the five-year average. In Near East Asian countries, following early rainfall deficits, widespread and above-average precipitation in late 2021 and early 2022 improved crop prospects, and outputs in 2022 are foreseen to be close to average levels. Generally favourable precipitation to date in Kazakhstan has bolstered production prospects and the wheat output is forecast to rise to a slightly above-average level. In North Africa, widespread drought conditions have affected crops in Morocco, western areas of Algeria and central Tunisia, denting overall wheat production prospects in 2022.

Regarding production of coarse grains, harvesting of the 2022 crops is to begin in the next months in the Southern Hemisphere countries, while in countries north of the equator, plantings have not yet begun. In South America, maize outputs in Argentina and Brazil in 2022 are forecast at well above-average levels, notably in Brazil where the maize output is foreseen to reach a record high of 112 million tonnes. The positive outlooks mostly rest on all-time high sowings, after farmers reacted positively to the higher domestic grain prices and strong export demand. In Southern Africa, the production outlook is similarly favourable in South Africa, where, despite a small reduction in plantings, the maize outturn is foreseen to remain above average in 2022, resting on beneficial weather conditions.

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

	Average 5 yrs	2020	2021 estimate	2022 forecast
European Union[1]	142.2	126.7	138.6	133.2
China (mainland)	134.1	134.2	137.0	137.4
India	103.9	107.9	109.6	111.3
Russian Federation	78.9	85.9	75.9	82.0
United States of America	49.2	49.8	44.8	52.8
Canada	30.4	35.2	21.7	31.2
Ukraine	27.2	24.9	32.0	28.0
Pakistan	25.7	25.2	27.3	28.9
Australia	24.4	33.3	35.4	25.0
Turkey	19.7	20.5	17.7	19.0
Argentina	19.5	17.6	22.1	21.0
Iran (Islamic Republic of)	13.2	14.0	9.0	13.0
Kazakhstan	13.3	14.3	11.8	13.5
United Kingdom of Great Britain and Northern Ireland	-	9.7	14.0	13.5
Egypt	8.8	9.0	9.0	9.0
Other countries	70.6	68.5	69.5	71.2
World	761.0	776.6	775.4	790.0

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

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

	2019/20	2020/21 estimate	2021/22 forecast	Change: 2021/22 over 2020/21 (%)
Cereal production[1]	*189.2*	*196.1*	*185.9*	*-5.2*
Utilization	*239.7*	*249.5*	*253.0*	*+1.4*
Food use	*179.8*	*185.5*	*191.5*	*+3.3*
Per caput cereal food use (kg per year)	*155.8*	*157.1*	*158.5*	*+0.9*
Feed	*26.0*	*28.4*	*27.5*	*-3.2*
End of season stocks[2]	*54.4*	*58.7*	*54.1*	*-7.9*

[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	2021 estimate	Change: 2021 over 2020 (%)
Africa (36 countries)	*110.5*	*117.9*	*113.2*	*-3.9*
East Africa	*55.0*	*58.9*	*53.4*	*-9.3*
Southern Africa	*10.4*	*11.1*	*14.2*	*+28.2*
West Africa	*38.2*	*41.0*	*38.6*	*-5.7*
Central Africa	*7.0*	*6.9*	*6.9*	*+0.8*
Asia (9 countries)	*72.1*	*77.2*	*71.7*	*-7.2*
CIS in Asia	*10.4*	*10.3*	*9.2*	*-11.0*
Far East	*52.8*	*55.2*	*56.1*	*+1.6*
Near East	*8.9*	*11.6*	*6.3*	*-45.5*
Central America and the Caribbean (2 countries)	*1.1*	*1.0*	*1.0*	*-0.9*
LIFDCs (47 countries)	*183.8*	*196.1*	*185.9*	*-5.2*

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

Adverse weather curbs initial production expectations of the 2022 cereal crop

Among the Low-Income Food-Deficit Countries (LIFDCs)[2], harvesting of the 2022 cereal crops is expected to start from April in *Southern Africa* and *Asia*, while sowing operations of the 2022 crop are anticipated to start at a similar time in *East Africa*, *Central Africa* and *West Africa*.

In *Southern Africa*, cereal production prospects are generally unfavourable in **Madagascar**, **Malawi**, **Mozambique** and **Zimbabwe**, reflecting a slow onset of seasonal rainfalls and below-average amounts during the first three months of the season, between October and December 2021. Subsequently, cyclones and tropical storms in January and February caused crop losses and cereal outputs are expected at average to below-average levels in 2022. In *East Africa*, the bulk of the 2022 cereal crops will be planted from March/April. Current weather forecasts indicate mixed outcomes in the forthcoming rainy season (March–May), with high levels of uncertainty. If models predicting below-average rainfall materialize, an unprecedented sequence of four consecutive poor rainy seasons will have dire consequences in terms of food availability and access. Moreover, in conflict-affected areas, including **South Sudan** and the Tigray Region of **Ethiopia**, farming activities are expected to continue to be disrupted, further weighing on the production outlook. In *West Africa*, sowing of the 2022 cereal crops will also begin in March/April. Similarly, the effects of conflicts in several countries are expected to continue to

[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). For full details see: www.fao.org/countryprofiles/lifdc

hinder farmers' access to inputs, following reduced harvests in several countries in 2021, notably in **the Niger** and **Burkina Faso**. In *Near East Asian* countries, erratic distribution and below-average rainfall amounts at the start of the season in **the Syrian Arab Republic** and **Afghanistan** have diminished production prospects of the 2022 wheat crop. Sustained and conducive rainfall are needed for the remainder of the season to engender an improvement in crop conditions. In *CIS Asian* countries, poor rains, in conjunction with forecasts indicating a continuation of low precipitation amounts in the spring months, have curtailed prospects of the 2022 winter wheat crop to be harvested in June.

Above-average aggregate output in 2021

FAO's latest estimate for aggregate cereal production of LIFDCs in 2021 is pegged at 186 million tonnes, about 2.1 million tonnes higher than the average. The bulk of the increase relative to the average rests on large harvests in **Bangladesh** as well as *Southern African* countries, while production upturns in **Ghana** and **Senegal** also bolstered the overall aggregate output. By contrast, there were notably low cereal outturns in **the Sudan**, **the Niger**, **the Syrian Arab Republic** and **Afghanistan**, due to a combination of poor weather conditions and the effects of conflicts on farming activities.

Increased import requirements in 2021/22

The aggregate import requirement for LIFDCs in the 2021/22 marketing year are estimated at 66.6 million tonnes, 15 percent above the average of the previous five years. High import needs in *East African* and *West African* countries are mostly underpinning the above-average aggregate import requirement, reflecting shortfalls in production in 2021. Increased imports of wheat in **Bangladesh**, a consequence of the high rates of food consumption, are also supporting the overall above-average import requirement. In *Southern African* countries, the bumper harvests in 2021 cut import needs, most significantly in **Zimbabwe**.

Table 5. Cereal imports of LIFDCs

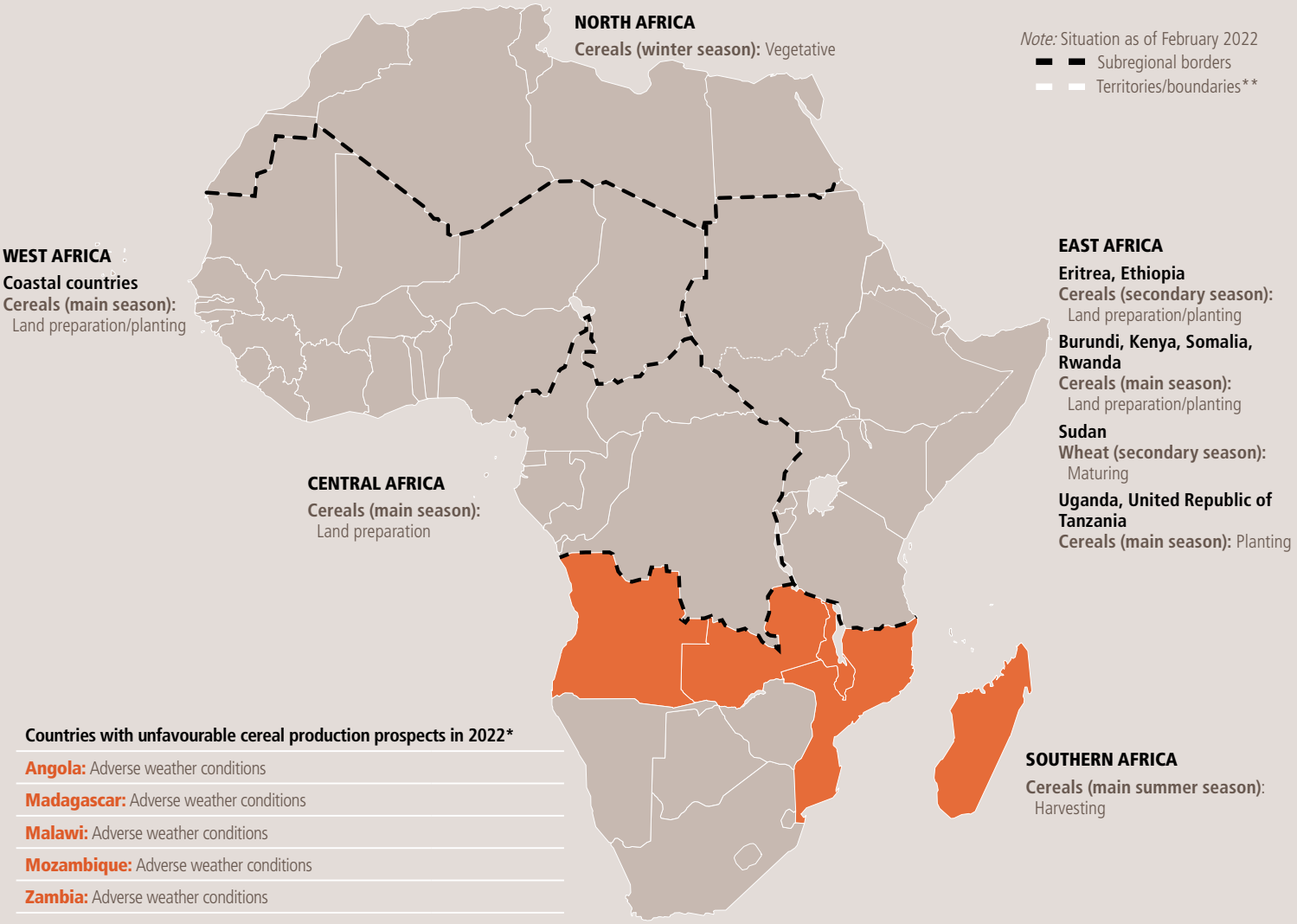
(thousand tonnes)

	2019/20 or 2020 Actual imports	2020/21 or 2021 Import estimate	2021/22 or 2022 Import requirement[1]
Africa (36 countries)	*29 111*	*31 912*	*34 478*
East Africa	*11 693*	*12 278*	*14 191*
Southern Africa	*3 154*	*3 911*	*3 098*
West Africa	*11 674*	*12 948*	*14 351*
Central Africa	*2 591*	*2 774*	*2 839*
Asia (9 countries)	*25 192*	*28 291*	*30 530*
CIS in Asia	*5 524*	*5 734*	*5 661*
Far East	*9 699*	*12 125*	*13 984*
Near East	*9 969*	*10 432*	*10 886*
Central America and the Caribbean (2 countries)	*1 631*	*1 632*	*1 615*
LIFDC (47 countries)	*55 934*	*61 835*	*66 624*

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.

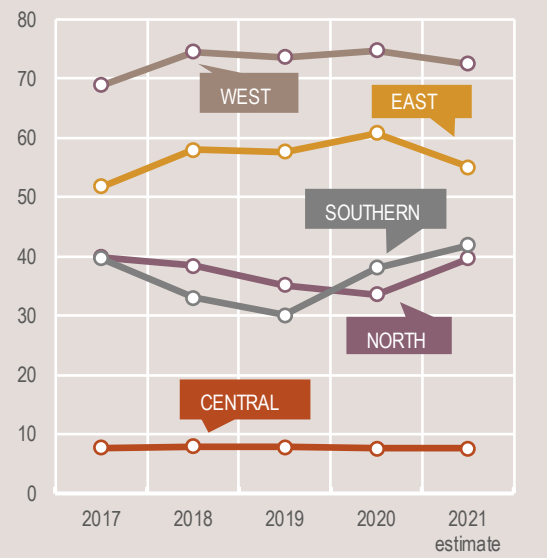
Source: GIEWS, 2022. *Crop Prospects and Food Situation #1* [online]. [Cited 3 March 2022], modified to comply with the United Nations map No. 4045 Rev. 8.1, 2018.

Production Overview

Total cereal production in Africa is forecast at 216.8 million tonnes in 2021, 6 percent above the five-year average. The large outturn reflects substantial outputs in Southern Africa due to near-ideal weather conditions, and in North Africa, primarily driven by an upturn in wheat production. The aggregate cereal harvest in East Africa fell to a belowaverage level in 2021, largely owing to the negative impacts of adverse weather and conflicts in parts. In West Africa, subregional cereal production remained above the average, but declined in 2021 due to erratic weather and persisting conflicts.

Harvesting of the 2022 cereal crops is expected to begin from April onwards in Southern Africa and production prospects have been impaired by dry conditions and extreme weather events, which are likely to result in reduced harvests in several countries. Production expectations in North Africa, with crops to be harvested in the second quarter of the year, have also been diminished by a poor start of the season. Planting of the 2022 crops in West Africa, East Africa and Central Africa will commence from April.

Cereal production
(million tonnes)



NORTH AFRICA

Drought in western areas worsens 2022 crop production prospects

Planting of the 2022 winter cereals, for harvest from May, was completed in January. In **Morocco**, **Algeria** and **Tunisia**, where cereal cultivation is mostly rainfed, rainfall amounts and distribution were sufficient to allow planting operations. However, estimated cumulative rainfall amounts between November 2021 and January 2022 accounted only for 60 percent of the average in **Morocco**, western coastal areas of **Algeria** and central **Tunisia,** resulting in widespread drought conditions. In eastern coastal areas of **Algeria** and in northern **Tunisia**, although abundant rainfall last November improved soil moisture reserves, more rainfall is needed in the coming months to sustain crop development. In **Egypt**, most cereal crops are irrigated and preliminary production forecasts point to an average output of 9 million tonnes.

Although in several countries of the subregion, governments subsidize some agricultural inputs to support domestic production, the recent sharp increases of international prices of fertilizers are likely to lead to reduced application rates, with negative consequences for crop yields.

Above-average cereal production in 2021

The subregion's aggregate cereal production in 2021 is estimated at 39.7 million tonnes, including 20.4 million tonnes of wheat and 4.3 million tonnes of barley. The cereal outturn in 2021 is over 18 percent above the output of the previous year and 9 percent above the average. This result is mostly on the account of the bumper crop harvested in **Morocco**, where the cereal output is estimated at 10.5 million tonnes, more than 60 percent above the average and almost three times higher on a yearly basis, reflecting beneficial rainfall. By contrast, in **Algeria**, pockets of drought resulted in a below-average output of 3.5 million tonnes, down 21 percent on a yearly basis. Elsewhere in the subregion, the 2021 cereal harvests were close to average.

All countries in the subregion rely heavily on wheat imports to cover their domestic consumption needs. The subregion's aggregate cereal import requirement, with wheat accounting for about 60 percent, in the 2021/22 marketing year (July/June) is estimated at a slightly above-average level of 51.5 million tonnes, with wheat accounting for about 60 percent. The import demand by all countries is likely to remain strong, as a significant proportion of wheat and rice imports will be used to build up domestic stocks.

Food inflation rates remained relatively low

Despite rising international food prices, the year-on-year food inflation rates remained at relatively low levels towards the end of 2021, buffered by subsidies on several basic commodities that have limited price transmission at the country level. Food price inflation in the subregion is driven by price increases in non-subsidized staples (fruits and vegetables, meat, dairy) and by the spill-over effect of higher oil and energy prices.

In **Morocco**, in December 2021, the annual food inflation rate increased to 4.5 percent, the highest level recorded in the past six years. In **Tunisia**, the annual food inflation rate fluctuated between 7 and 8 percent in the second half of 2021. In **Egypt**, where food inflation is quite volatile due to a large share of unsubsidized products, such as vegetables, in the inflation index, the rate gradually increased from about 1 percent in the first quarter of 2021 to almost 12 percent in October 2021, before decreasing to 8.4 percent in December 2021. In **Algeria**, food prices in October 2021 increased by about 12 percent year on year, with a slight decline from over 13 percent in the previous month. In **Libya**, the annual food price inflation in December 2021 was recorded at 4.7 percent, down from 6 percent in the previous month.

According to the 2022 **Libya** Humanitarian Needs Overview, about 0.9 million people (10 percent of the population and down from 1.3 million people one year earlier) are estimated to be in need of humanitarian assistance, including 500 000 people who require food assistance.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
North Africa	18.0	15.8	20.4	12.0	11.1	12.9	6.3	6.6	6.4	36.3	33.6	39.7	+18.1
Algeria	3.2	3.1	2.5	1.4	1.3	1.0	0.0	0.0	0.0	4.6	4.4	3.5	-20.6
Egypt	8.8	9.0	9.0	8.3	8.5	8.5	6.3	6.5	6.3	23.4	24.1	23.8	-1.3
Morocco	4.8	2.6	7.5	1.7	0.7	2.9	0.1	0.1	0.1	6.5	3.3	10.5	+214.9
Tunisia	1.1	1.0	1.2	0.5	0.5	0.5	0.0	0.0	0.0	1.7	1.5	1.7	+7.5

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

WEST AFRICA

Planting of the 2022 main season starts under favourable weather conditions

Land preparation and planting of the main 2022 cereal crops started recently in southern areas of countries along the coast of Guinea, with the onset of seasonal rains in March. As the rainy season will progress northwards, planting activities will begin in April in the southern parts of the Sahelian countries. Regional weather forecasts indicate a higher-than-normal likelihood of average to above-average rainfall amounts between March and May, which are expected to support the establishment of the main season crops. There are concerns regarding the areas affected by conflicts, particularly in Liptako-Gourma and Lake Chad regions, as persisting insecurity conditions are likely to hamper access to fields and limit the availability of labour and agricultural inputs.

Aggregate cereal production in 2021 estimated slightly above average

Harvesting of the 2021 off-season crops was completed in the first quarter of 2022 in Sahelian countries and northern parts of countries along the Coast of Guinea, following the completion of the main 2021 season harvest in December. In coastal countries, favourable weather conditions, coupled with government support through the distribution of subsidized agricultural inputs, boosted cereal production, notably in **Ghana**, **Senegal** and **Guinea-Bissau**, where bumper outputs were estimated. In **Nigeria**, the subregion's main producer, the 2021 cereal output was estimated slightly above the average and higher than the previous year's level. However, protracted insurgent violence in the northeast and increased insecurity in the northcentre and northwest, resulted in localized production shortfalls. In Sahelian countries, the adverse effects of unfavourable weather conditions, which were compounded by conflicts in the Liptako-Gourma and Lake Chad regions, curbed crop plantings and yields. Cereal production was estimated at reduced levels in **Mauritania**, **Chad** and, notably, **the Niger**, where the cereal output was 40 percent below the five-year average. In **Burkina Faso** and **Mali,** cereal outturns were estimated to be near the averages. At the subregional level, the aggregate cereal outturn is estimated at 72.6 million tonnes in 2021, slightly above the five-year average and near the record high output of 2020, despite a small year-on-year decline.

The unfavourable weather conditions in Sahelian countries, including a late onset and early cessation of rains, recurrent dry spells and torrential rains, negatively affected pasture conditions and forage production. In addition, the fragile security conditions in Liptako-Gourma region, hampered transhumance movements and access to pastoral resources in **the Niger**, **Mali** and **Burkina Faso**, resulting in a deterioration of livestock body conditions and increased likelihood of an early start of the pastoral lean season, which normally starts in April. Elsewhere in the subregion, pastoral conditions are generally favourable.

Prices of coarse grains trended upward in most countries

In Sahelian countries, reduced cereals outputs in 2021, due to unfavourable weather conditions and conflict-related disruptions to marketing activities, supported an increase in cereal prices. These effects were prevalent in **the Niger**, where prices of domestically produced millet and sorghum increased since November 2021 and reached near-record levels in January 2022, about 25 percent higher year on year. In **Burkina Faso**, prices of coarse grains also increased steadily since the end of 2021 and by January 2022 prices were over 40 percent higher on a yearly basis. Persisting conflict in northeastern parts resulted in widespread population displacements and disrupted agricultural livelihoods, rendering households more reliant on market supplies and adding pressure on coarse grain prices. In **Mali**, following unseasonal increases in the last quarter of 2021, prices of coarse grains started to decline in January, underpinned by the commercialization of recently harvested crops. However, prices remained over 45 percent higher year on year, supported by market disruptions and localized production shortfalls amid severe insecurity conditions in central and western parts of the country. In **Chad**, prices of locally produced coarse grains declined or remained stable between October and December 2021, but they were still about 10 percent above their year-earlier levels. In southern areas, affected by weather hazards and the conflict-affected Lake Chad Basin area, prices were higher than elsewhere in the country.

Table 7. West Africa cereal production

(million tonnes)

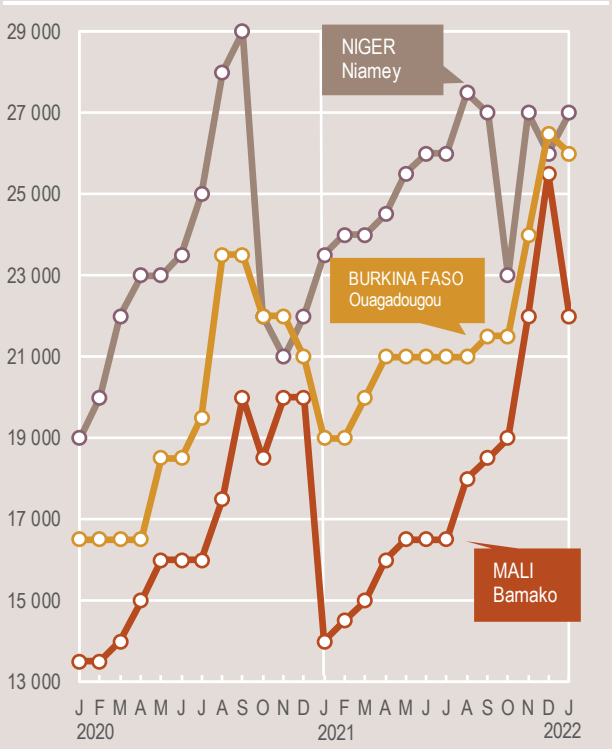
	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
West Africa	50.9	53.5	51.6	20.7	21.2	20.9	71.7	74.7	72.6	-2.9
Chad	2.6	2.6	2.5	0.3	0.3	0.2	2.9	2.9	2.7	-6.3
Ghana	2.9	3.6	4.2	0.8	1.0	1.0	3.7	4.6	5.2	+13.4
Niger	5.6	5.5	3.4	0.1	0.1	0.1	5.7	5.6	3.5	-36.5
Nigeria	20.9	21.0	21.1	8.1	8.2	8.3	29.1	29.2	29.5	+0.9

Notes: This production data is from early November and does not include figures from the latest CILSS meeting. 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).

In countries of the Gulf of Guinea, strong export demand, high transportation costs and currency depreciations outside of the Communauté Financière Africaine (CFA) remained the main factors underpinning the high food prices. In most markets of **Ghana**, prices of maize and millet levelled off in the last quarter of 2021 and early 2022, following strong gains in the months that preceded the onset of the harvest in August 2021. The stabilization of prices reflects improved supplies from the well above-average cereal output in 2021. However, in some central and northern commercial hubs, there was an uptick in prices in early 2022, driven by increased export demand from neighbouring Sahelian countries. In **Benin** and **Togo**, prices of coarse grains generally increased or levelled off since last December, mostly reflecting strong domestic and export demand. In **Nigeria**, following a seasonal decline between September and October 2021, prices of coarse grains increased until the end of the calendar year, underpinned by high transportation costs and localized production shortfalls. As of December 2021, prices of locally produced millet, sorghum and maize were between 30 and 45 percent above their year-earlier levels. The high prices were also supported by a weak national currency. The deterioration of security conditions in the north of the country negatively affected the 2021 cereal production and marketing activities, adding further pressure on food prices.

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



Source: Afrique Verte.

Food insecurity levels projected to increase sharply in 2022

By the end of 2021, the humanitarian situation was critical in the major hotspots of the subregion and it is expected to deteriorate sharply in 2022. According to the latest "Cadre Harmonisé (CH)" analysis, the number of people that faced severe food insecurity, CH Phase 3 (Crisis) and above, in the subregion was estimated at 23.7 million between October and December 2021. Of particular concern, about 600 000 people were estimated to be in CH Phase 4 (Emergency). The highest incidence of food insecurity was reported in **Nigeria**, where about 12.9 million people needed urgent food assistance, followed by **the Niger** (2.58 million), **Burkina Faso** (1.65 million), **Mali** (1.17 million), **Sierra Leone** (1.1 million) and **Chad** (965 000). In the upcoming peak of the lean season, between June and August 2022, if appropriate humanitarian measures and responses are not implemented, about 33.4 million people are projected to face severe food insecurity, the highest level on record and well above the 27.1 million estimated during the same period in 2021. The projected figures include about 1.7 million people facing CH Phase 4 (Emergency), located in northeastern Nigeria, and about 13 550 people facing CH Phase 5 (Catastrophe).

The deterioration of the food security situation in 2022 mainly stems from the high food prices, low availability of cereals, protracted conflicts and rising insecurity, particularly in the Liptako-Gourma and the Lake Chad regions, which have resulted in alarming levels of displacement. Reflecting the economic slowdown due to the COVID-19 pandemic, the Economic Community of West African States (ECOWAS) estimated a small increase in the number of people living in extreme poverty (with less than USD 1.9/day) in 2021. The erosion of households' purchasing power is expected to further constrain access to food. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), as of January 2022, about 5.8 million people were internally displaced in **Burkina Faso**, **Chad**, **Mali**, **the Niger** and **Nigeria**, compared to 4.8 million estimated a year before, while nearly 1 million people sought shelter in these countries as refugees.

Additional concerns remain in **Mali** due to the imposition of stringent international sanctions that are likely to slow down economic activity and compound an already limited access to, and availability of, food. The sanctions were imposed by ECOWAS in early January 2022, following the announcement by the transitional military government of the postponement of presidential elections, and these include the closure of all borders and a trade embargo as well as cutting off financial aid and freezing the country's assets at the Central Bank of West African States. In **Burkina Faso**, the impact of the coup d'état on 24 January 2022 is an additional factor that could increase civil insecurity and further stress the already severe food insecurity conditions.

CENTRAL AFRICA

Conflicts and COVID-19 measures continue to affect agricultural activities

Sowing of the 2022 secondary season maize crop, to be harvested from May, is underway in the bimodal rainfall areas of **the Republic of the Congo**, **Gabon** and in the northern provinces of **the Democratic Republic of the Congo**. Weather conditions have been generally favourable since December 2021 in most cropland areas. In the southernmost unimodal rainfall areas of **the Democratic Republic of the Congo**, planting of maize crops, to be harvested from May, finalized in January. Following a period of sparse rainfall and higher-than-average temperatures, increased precipitation amounts in January in Haute-Katanga province benefited crop establishment and germination. Planting of the 2022 main season maize crop will begin in mid-March in **Cameroon** and in **the Central African Republic**, and the harvest is expected to take place from July.

Weather forecasts until May point to below-average rainfall amounts in **Gabon**, **the Republic of the Congo**, southern **Cameroon** and in some western areas of **the Democratic Republic of the Congo**, which may have a negative impact on cereal crops. The ongoing insecurity and population displacements in **the Central African Republic**, eastern areas in the Democratic Republic of the Congo and Far North, Northwest and Southwest regions of Cameroon, coupled with restrictive measures related to the COVID-19 pandemic, are expected to continue to limit farmers' access to crop-growing areas and inputs.

Imported rice prices remained high

During the last quarter of 2021, prices of locally produced staple foods remained mostly stable and at comparable year-on-year levels in **the Central African Republic**, while they were higher than the previous year in Far North region of **Cameroon**. In conflict-affected Northwest and Southwest regions of Cameroon, a reduced agricultural output in 2021 resulted in the early depletion of households' stocks and the start of the lean season in February, about one month earlier than normal. This has increased households' reliance on markets and triggered price increases. On 27 December 2021, exports of locally produced cereals from Cameroon were suspended, as a measure to curb price increases and ensure adequate supplies of staple commodities in domestic markets (FPMA Food Policy). In **Cameroon** and **the Central African Republic**, prices of imported rice remained elevated in urban areas, reflecting low import volumes, in part, due to the impact of constraints related to COVID-19 on the food supply chains.

Over 30 million people severely food insecure in early 2022

In the first quarter of 2022, a total of 30.5 million people are estimated to be severely food insecure in the Democratic Republic of the Congo, Cameroon and the Central African Republic, about one quarter of the aggregate population. Conflicts continued to cause population displacements and widespread disruption of agricultural and marketing activities with negative consequences on food availability and access. In addition, the economic effects of the COVID-19 pandemic, coupled with the high level of food prices, substantially reduced households' purchasing power.

In **the Democratic Republic of the Congo**, according to the latest IPC analysis, 26 million people (about 25 percent of the total population) were projected to be severely food insecure between January and June 2022. In addition, 857 000 children under the age of five are estimated to be acutely malnourished between September 2021 and March 2022 in 70 out of 519 "health zones". In **the Central African Republic**, estimates from the most recent IPC analysis puts the number of people in IPC Phase 3 (Crisis) and above at 2.1 million (43 percent of the total population) between September 2021 and March 2022. Furthermore, about 214 000 children under the age of five were estimated to be Moderately Acutely Malnourished (MAM) between September 2021 and February 2022 in 68 out of 71 "sus-prefectures". In **Cameroon**, according to the October 2021 CH analysis, the number of severely food insecure people, CH Phase 3 (Crisis) and above, was estimated at 2.4 million (9 percent of the total population) between October and December 2021.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	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	+1.4

Notes: 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).

EAST AFRICA

Cereal production declined to average levels in 2021 due to erratic rains

The total subregional cereal output is estimated at about 55 million tonnes in 2021, close to the average of the previous five years and 9 percent down from 2020.

Harvesting of the 2021 secondary season cereal crops recently concluded in **Uganda**, southern **South Sudan**, northeastern **United Republic of Tanzania** ("Vuli"), southern and central **Somalia** ("Deyr") and in **Kenya** ("short-rains"). In **the Sudan**, the main 2021 cereal harvest was also recently completed. The October–December 2021 seasonal rains were generally unfavourable, with below-average rainfall amounts and erratic temporal distribution, especially over northern and eastern **Kenya**, southeastern **Ethiopia** and **Somalia**.

In **Somalia**, severe rainfall deficits resulted in a below-average planted area, widespread germination failures and crop wilting. In riverine areas along the Juba and Shabelle rivers, where farmers practice irrigation and flood recession agriculture, crop production was also reduced due to low water levels. As a result, the aggregate "Deyr" cereal production is estimated to be about 40 percent below the five-year average, resulting in a fourth consecutive season with a reduced cereal output. In **Kenya**, the cereal output of the "short-rains" harvest is estimated to be about 50 percent below average, leading to a third consecutive season with below-average cereal production. A near failure of the harvest is reported in coastal marginal agriculture areas, where maize production is estimated at less than 10 percent of the average. Here, due to severe dryness, planted area was well below average, while most crops failed to germinate or wilted. Rains at end of November and beginning of December allowed some late planting of cereals and pulses, which germinated but did not reach maturity as rains subsided in late December. In bimodal rainfall areas of **the United Republic of Tanzania**, the performance of the "Vuli" rainy season has been mixed, with above-average rainfall amounts in most northern regions but significant rainfall deficits in northeastern and coastal regions. In **Uganda**, poor rains in northern, central and eastern areas have resulted in significant shortfalls in crop production and the output of the second season harvest is estimated at a below-average level. In **South Sudan**, according to the preliminary findings of the FAO/WFP Crop and Food Security Assessment Mission, the 2021 aggregate cereal production is estimated to be slightly below the output of the previous year and well below the pre-conflict level. The output contraction is mainly due to the unprecedented floods, which affected Jonglei, Warrap, Lakes and Upper Nile states. In most areas not affected by the floods, below average and erratic rains reduced yields. In **the Sudan**, according to the preliminary findings of the 2021 Government-led Annual Crop and Food Supply Assessment Mission, supported by FAO, cereal production is estimated at a well below-average level, mainly on account of erratic weather conditions, with prolonged dry spells that affected sorghum and millet crops during the critical flowering stage.

Pastoral areas of southeastern Ethiopia, Kenya and Somalia affected by severe drought

The October–December rainy season had a very poor performance in pastoral areas of southeastern **Ethiopia**, central and northern **Somalia,** and northern and eastern **Kenya**. It was the third consecutive rainy season characterized by below-average rainfall amounts and the cumulative impact of dry weather since October 2020 has severely affected rangeland resources. Scattered showers received in early December had some localized positive impacts on rangeland and livestock conditions, but improvements have been short-lived as the dry season started in January. Prolonged pasture and water shortages have resulted in the significant deterioration of livestock body conditions, causing abortions and very low birth rates, and widespread animal deaths. In late December 2021, herd sizes in these areas were estimated to be between 30 and 50 percent below average, indicating that most pastoral households have entered the 2022 (January–March) "Jilaal" dry season with less resources than after the severe drought that occurred in 2016/2017.

Land preparation is underway for 2022 main season crops

Land preparation for the 2022 main season cereal crops started in the major growing areas of Central, Rift Valley and

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
East Africa	6.1	6.9	6.5	46.2	48.4	43.7	56.5	60.8	55.1	-9.3
Ethiopia	5.0	5.8	5.5	22.8	24.2	23.0	27.9	30.1	28.6	-5.0
Kenya	0.3	0.3	0.3	4.0	4.2	3.4	4.4	4.7	3.8	-19.1
Sudan	0.6	0.7	0.6	6.9	7.1	4.5	7.5	7.9	5.1	-34.8
Uganda	0.0	0.0	0.0	3.3	3.4	3.2	3.5	3.6	3.4	-6.2
United Republic of Tanzania	0.1	0.1	0.1	7.3	7.4	7.6	10.7	12.0	11.7	-2.3

Notes: 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).

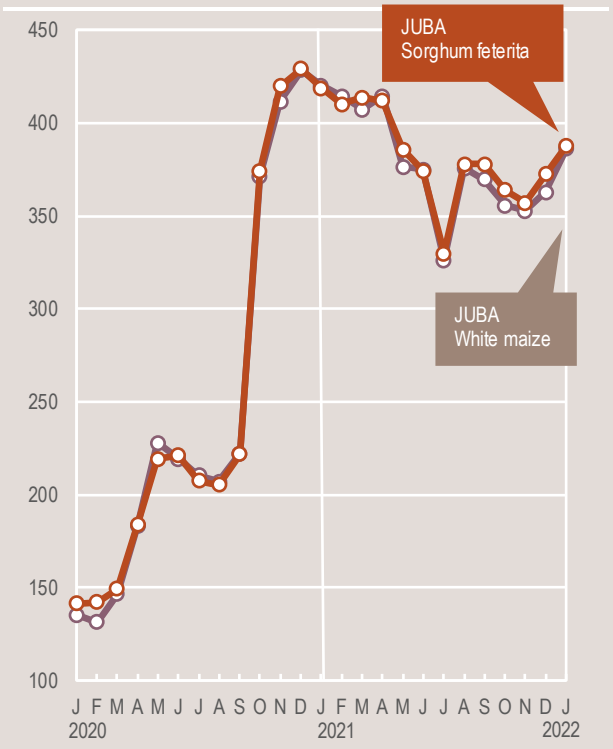
Western provinces in **Kenya** ("long-rains" season), in southern and central **Somalia** ("Gu" season) and in southern bimodal rainfall areas of **South Sudan** and **Uganda**. In **Ethiopia**, planting of the secondary "Belg" season crops, for harvest from May, is currently underway in eastern Amhara, eastern Oromia, southern Tigray and northeastern SNNP regions. In the conflict-affected Tigray and Amhara regions, planting operations are likely to be affected by insecurity and input shortages due to market disruptions. In most central and southern unimodal rainfall areas of **the United Republic of Tanzania**, the start of the November–April "Msimu" rains were delayed by about one month and subsequent sparse amounts in December affected crop planting and establishment. Although precipitation improved in the following weeks, vegetation conditions in early February were still below average. The performance of seasonal rains during the remainder of the growing season will be crucial. In **Rwanda** and **Burundi**, the harvest of the "2022A" season crops concluded in February, about a month later than normal. Rainfall deficits resulted in production declines in eastern Rwanda, as well as in eastern and northern Burundi, leading to an average production in both countries.

The performance of the March–May rainy season is difficult to predict and current forecasts indicate mixed outcomes with high levels of uncertainty. If models predicting below-average rainfall amounts materialize, an unprecedented sequence of four consecutive poor rainy seasons will have dire consequences in terms of food availability and access.

Cereal prices increased to unprecedented levels

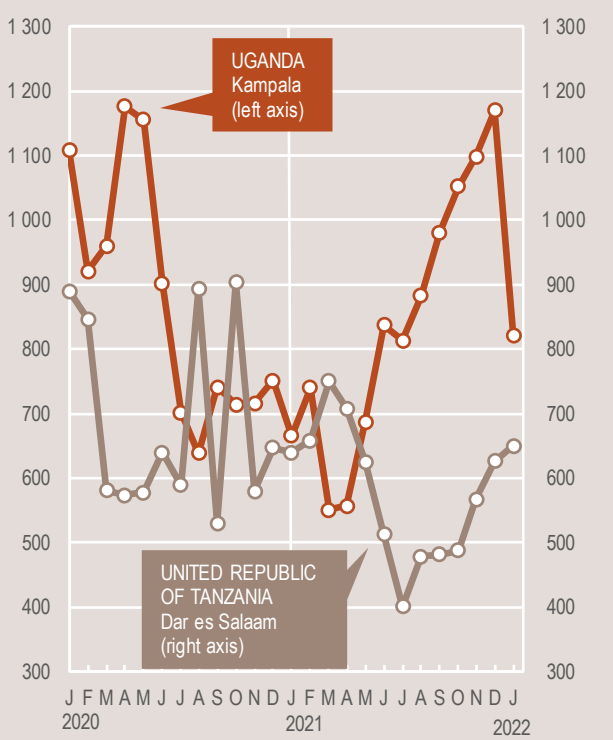
In **the Sudan**, despite the availability of newly harvested 2021 crops, prices of sorghum remained firm between October 2021 and January 2022, while prices of millet increased by 15–40 percent over the same period, in contrast to normal seasonal trends. Prices were up to twice their year-earlier levels, mainly due to tight supplies, the continuous depreciation of the national currency and soaring prices of agricultural inputs that inflated production costs. In **South Sudan's** capital, Juba, prices of sorghum and maize increased unseasonally by about 10 percent between November 2021 and January 2022 due to a reduced 2021 cereal output. The protracted difficult macroeconomic situation, inadequate domestic supplies and insecurity disrupting trade flows underlie the high food prices. In **Ethiopia**, prices of maize declined between October 2021 and January 2022 by 5–10 percent as the recently harvested 2021 main "Meher" crops increased market supplies. However, prices remained up to twice their year-earlier levels, mainly due to the continuous depreciation of the national currency. In **Uganda**, prices of maize declined by 15–30 percent month on month in January, as newly harvested crops increased market supplies, following increases in the second half of 2021, with seasonal patterns compounded by concerns over the performance of the second season harvest in 2021. However, they remained between 25 and 45 percent higher year on year, mainly due to a below-average cereal production in 2021. In **Somalia**, prices of maize increased by as much as 20 percent between October and December 2021 in markets located in the key producing Lower Shabelle region, while sorghum prices increased by 55 to 80 percent in the

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)



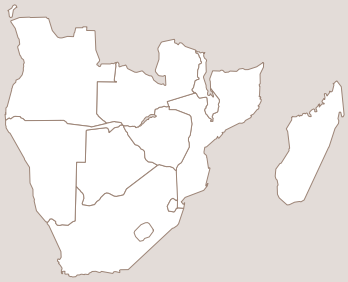
Source: Regional Agricultural Trade Intelligence Network.

"sorghum belt" of Bay region. The increases were due to concerns over the performance of the "Deyr" harvest, which exacerbated normal seasonal trends. Prices in December were more than twice the high levels of a year earlier, and close to the high levels reached during the 2016–2017 drought due to reduced availabilities following four consecutive below-average harvests. In **the United Republic of Tanzania**, prices of maize increased by 65–85 percent between October 2021 and January 2022 in central and southern unimodal rainfall areas, as concerns over the performance of the upcoming "Msimu" harvest amplified seasonal patterns. Prices also increased in markets located in northeastern bimodal areas due to significant losses of "Vuli" crops and as of January prices were up to 40 percent higher on a yearly basis.

Multiple shocks drive up the number of food insecure

Despite some recent short-lived and localized improvements due to the availability of newly harvested crops, the food security situation remains alarming in several countries of the subregion, as the reduced harvests did not allow an adequate replenishment of household stocks and resulted in an early onset of the lean season. In **Kenya**, **Somalia** and southeastern **Ethiopia**, prolonged drought conditions since late 2020 have constrained food availability and access, and resulted in high levels of food insecurity. In **Kenya**, the number of food insecure people was estimated at 3.1 million in February 2022, more than twice the estimate from early 2021. An alarming food security situation is reported in **Somalia**, where, in the absence of adequate humanitarian assistance, about 4.15 million people, more than 25 percent of the total population, are estimated to face severe food insecurity between February and March 2022. In **Ethiopia**, 18 million people are officially estimated to be food insecure. According to the 2021 Humanitarian Response Plan Mid–Year Review, without considering the conflict-affected Tigray region, about 12.8 million people are estimated to be in need of food assistance. Out of this figure, 3.9 million people are estimated to be food insecure in the drought-affected Somali region. In the Tigray region, according to the Revision of the 2021 Northern Ethiopia Response Plan, about 5.2 million people are facing severe food insecurity due to the impact of the conflict on livelihoods. In **South Sudan**, about 7.2 million people (about 60 percent of the total population) were estimated to face severe levels of acute food insecurity between April and July 2021. The highest prevalence of food insecurity was reported in Jonglei, Northern Bahr-el-Ghazal, Warrap states and in Pibor Administrative Area, where between 60 and 85 percent of the population was estimated to be severely food insecure, including about 108 000 people in IPC Phase 5 (Catastrophe). Although there are no recent food security analyses, the situation has likely worsened due to a reduced cereal production and widespread floods in 2021, that caused large–scale displacements and livelihood losses. In **the Sudan**, 6 million people were estimated to be severely food insecure between October 2021 and February 2022, about 40 percent less than in the June–September period, as the newly harvested 2021 crops improved food availability. However, as this estimate was conducted in May 2021 under the assumption of a good performance of the 2021 cropping season, the current severity and prevalence of food insecurity are likely to be higher due to the below-average cereal production obtained in 2021.

SOUTHERN AFRICA



Poor early seasonal rains and extreme weather events affect cereal production in 2022

Harvesting of the 2022 cereal crops is anticipated to begin in April. Following two years of bumper harvests, cereal outturns in most countries are forecast at below-average to average levels in 2022, reflecting poorly distributed rains at the start of the season in November and December 2021, and the impacts of tropical storms and cyclones in January and February 2022. However, an above-average output is foreseen to be harvested in South Africa as well as in Eswatini and Lesotho, which would help to avert an otherwise large decline of supplies at the subregional level.

Substantial year-on-year cereal production declines are forecast in **Malawi**, **Zambia** and **Zimbabwe**, where harvests are likely to fall to below-average to average levels after the bumper outputs obtained in 2021. As of early February, remote sensing data indicated lower-than-normal cumulative rainfall amounts in most cropland areas of the aforementioned countries. Consequently, values of soil moisture levels and vegetation conditions were low, inferring poor crop health. With only a few months of the rainy season remaining,

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
Southern Africa	2.1	2.5	2.7	27.0	30.7	34.1	4.2	4.9	5.1	33.3	38.0	41.9	+10.1
excl. South Africa	0.3	0.4	0.6	13.1	13.9	16.5	4.2	4.9	5.1	17.6	19.1	22.1	+15.6
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.7	4.2	4.4	3.9	4.5	4.6	+3.8
Malawi	0.0	0.0	0.0	3.3	3.9	4.7	0.1	0.1	0.1	3.4	4.0	4.9	+21.6
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	2.2	13.9	16.8	17.6	0.0	0.0	0.0	15.7	18.9	19.8	+4.5
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	0.3	1.4	1.1	3.1	0.0	0.0	0.0	1.5	1.3	3.4	+175.0

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

crop yields are forecast at reduced levels, underpinning the unfavourable production outlook in 2022. In addition, tropical storm Ana led to large swathes of cropland being submerged and, although field assessments have not quantified the impact, some crop losses are expected, further weighing on production expectations. Tropical storm Ana also severely affected crops in **Madagascar** and **Mozambique**. Cyclones Batsirai and Emnati, and tropical storm Dumako also impacted Madagascar in February. These extreme events caused flood damage to the agriculture sector and shortfalls in cereal production are foreseen in eastern parts of Madagascar and central provinces of Mozambique, areas where the cyclones and storms made direct impact. By contrast, reduced seasonal rainfall in southern Madagascar is expected to extend the number of consecutive years of low agricultural outputs in these areas. In **South Africa**, the main cereal producer in the subregion, production prospects are more favourable, because of generally well-distributed rainfall throughout the season and minimal impact on crops by the tropical storms. Notwithstanding a small cutback in the maize acreage, partly underpinned by high production costs caused by rising international input prices and heavy rains at planting time, maize production in 2022 is forecast at an above-average level and would likely exceed 15 million tonnes, albeit below the record in 2021. In neighbouring **Botswana**, **Eswatini** and **Lesotho**, production outlooks are equally favourable, reflecting adequate rainfall amounts, and cereal harvests are forecast at average to above-average levels in 2022. In **Namibia**, production prospects are more uncertain as, despite temporally well-distributed rainfall, total precipitation amounts have been lower than average. Southern provinces of **Angola** are facing a third consecutive season of poor rains and crop production is likely to remain at a very low level. However, conditions in the main cereal producing central provinces are more favourable compared to the previous year and the aggregate national production is expected to increase moderately in 2022, but still remain below the average.

Large stocks could partly cushion shortfalls in production in 2022

In the 2021/22 marketing year (generally April/March), the total cereal import requirement is forecast at a below-average level of about 8.4 million tonnes, on account of the large domestic 2021 harvests. Concurrently, export volumes, principally maize grain, increased to an above-average level. The bulk of exports is from South Africa, where about 3 million tonnes of mostly yellow maize are forecast to be exported.

In consideration of the large domestic outturns in 2020 and 2021, most countries are estimated to hold above-average cereal inventories that will partially cushion the foreseen production declines in 2022. Nonetheless, import requirements are anticipated to increase in the 2022/23 marketing year in order to ensure sufficient national supplies.

Maize prices strengthened seasonally

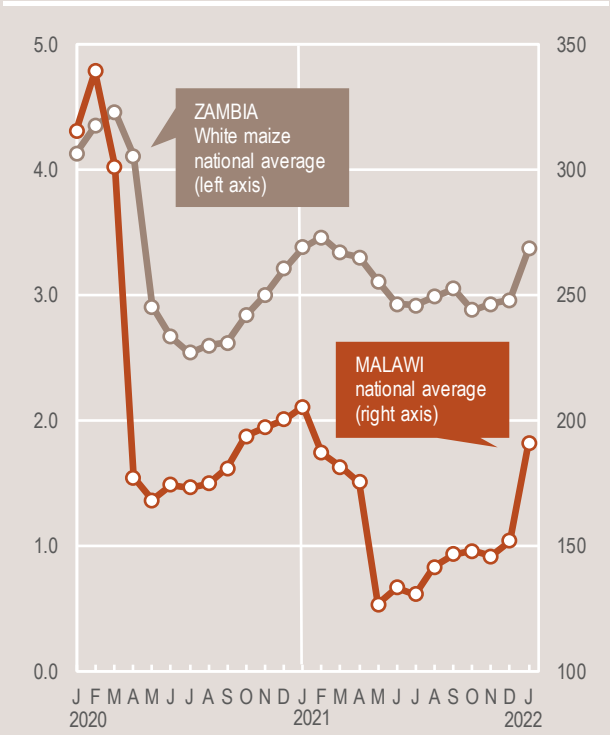
Following generally stable trends throughout most of 2021, maize prices increased seasonally at the end of last year and beginning of 2022. However, substantial supplies at the subregional level contained more significant price rises. Wheat prices also strengthened in several countries and in consideration that this cereal is mostly imported, the rises have been underpinned by high prices in the international market. In **Zambia** and **Malawi**, prices of maize grain increased in December 2021 and January 2022, but continued to remain below the levels of the previous year, reflecting the good national supply situations. In Malawi, temporary spikes of prices of maize occurred in February in the Southern region, where the tropical storm Ana caused damage to crops and disrupted supply chains. In **Zimbabwe**, the food inflation rate remained stable at about 7 percent in January 2022 compared to the previous two months, reflecting a broadly unchanged value of the national currency against the US dollar. However, prices were still 65 percent higher on a yearly basis, continuing to curtail economic access to food, particularly for low-income households. In **South Africa**, the wholesale price of maize was firm in January and February 2022, following sharp gains in the last quarter of 2021. The recent stability is partly attributed to an appreciation of the national currency against the US dollar, which eased pressure on domestic prices. Additionally, the maize production outlook in 2022 is favourable and this is a further factor that contributed to stabilizing prices in early 2022. In import-dependent **Botswana**, **Eswatini** and **Namibia**, while maize prices have been comparatively stable in 2021 and dipped in recent months, prices of wheat and bread continued to rise in December and January.

Extreme weather events and expected production declines foreseen to worsen food insecurity in 2022

During the peak lean season, between January and March 2022, the number of food insecure people requiring humanitarian assistance was projected at 22 million, down from the 24 million estimated in the first quarter of 2021. The lower number reflects the large availability of grains from the above-average cereal harvests in 2021 that helped to counter the adverse impact on food access due to the low household incomes caused by the COVID-19 pandemic.

However, it is very likely that the current humanitarian needs are higher than

Maize prices in selected Southern African markets



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

the projected figure, on account of the negative effects of the recent extreme weather events on crops and productive assets, particularly in **Madagascar**, **Malawi** and **Mozambique**. In these three countries, initial estimates indicated that 1.7 million people were affected by tropical storm Ana at the end of January. In addition, cyclone Batsirai made landfall in Madagascar in early February, causing further flood damage, while subsequent tropical storm Dumako brought more heavy rains to the country. Damage caused by these extreme events is expected to have a direct detrimental impact on households' food security conditions, while also reducing their coping capacity options.

The southern regions of Angola and Madagascar are facing a third and fourth successive year, respectively, of reduced seasonal rains and a high likelihood of another low agricultural output in 2022. In southern **Madagascar**, the latest IPC analysis indicates that nearly 334 000 people are experiencing IPC Phase 4 (Emergency) between January and March 2022, with households suffering from large food consumption gaps and using emergency coping strategies. The provision of humanitarian assistance in recent months has, however, averted a catastrophic situation. In **Angola**, nearly 1.6 million people were assessed to be in IPC Phase 3 (Crisis) in the first quarter of 2022, approximately 58 percent of the analysed population. The prospects of a low agricultural outturn in 2022 in southern areas of Angola and Madagascar, coupled with reduced cereal harvests in several other countries, are expected to result in an increase in the number of acutely food insecure people during last quarter of 2022.

REGIONAL REVIEWS
ASIA

Countries with unfavourable cereal production prospects in 2022*

Sri Lanka: Shortages of agrochemicals and high prices of fuel

*/** 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.

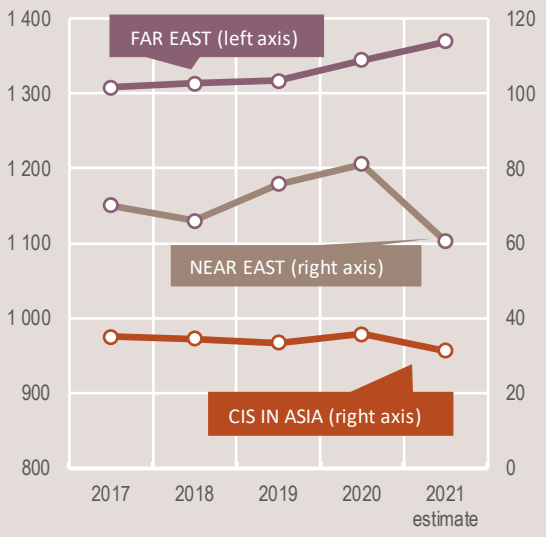
Source: GIEWS, 2022. *Crop Prospects and Food Situation #1* [online]. [Cited 3 March 2022], modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Production Overview

The aggregate cereal output in Asia in 2021 is forecast at 1 461 million tonnes, about 3 percent up on the average. Large cereal outturns in Far East Asian countries account for the substantial output, with several countries registering near or near-record harvests of maize and paddy, while the subregion's wheat production reached a record high. Lower cereal harvests, primarily wheat, were estimated in Near East Asian and CIS Asian countries, owing to adverse weather conditions, but also the effects of conflicts in the former subregion.

The 2022 wheat crop is expected to be harvested from April onwards in Far East Asia and production prospects point to an above-average outturn in 2022, underpinned by large plantings. Prospects are further bolstered by favourable weather conditions in the main producing countries. By contrast, sustained and beneficial rains are needed for the rest of the season in Near East Asian countries, following earlier rainfall deficits. Similarly, in parts of CIS Asia, low precipitation amounts and forecasts pointing to a continuation of reduced rainfall have impaired production prospects of the 2022 winter cereal crops.

Cereal production
(million tonnes)



FAR EAST

Above-average wheat production forecast in 2022

Harvesting operations of the 2022 winter wheat crop, which is mostly produced under irrigation, are expected to take place between March and June 2022. Overall, the total wheat acreage is estimated above the five-year average, sustained by strong demand and high prices in several countries. Current growing conditions are near average throughout the subregion, supported by well-distributed and adequate amounts of precipitation. Supplies of agricultural inputs, such as irrigation water, fertilizers and pesticides, have been adequate, further boosting yield prospects. In **China (mainland)**, the area planted is estimated at an above-average level and field assessments indicate that wheat crop conditions and soil moisture levels are near average in the main producing areas. In **India**, the area planted with the 2022 wheat crop is estimated to be close to last year's high level, supported by generally favourable weather conditions and remunerative producer prices guaranteed by the government. In **Pakistan**, adequate water availability and supplies of agricultural inputs underpinned a large acreage and bolstered yield prospects, and the government forecasts a record wheat production of 28.9 million tonnes.

In countries of the Southern Hemisphere and along the Equator, harvesting of the 2022 main paddy and coarse grain crops is about to start and production prospects are generally positive, owing to favourable weather conditions and adequate supplies of agricultural inputs. The exception is **Sri Lanka**, where the 2022 main "Maha" cereal crops have been affected by shortages of agricultural inputs, including fuel, and a below-average output is expected.

Aggregate cereal production in 2021 pegged at a high level

The 2021 subregional aggregate cereal output is forecast at a record high of 1 365 million tonnes (rice in paddy equivalent), reflecting bumper main harvests and generally favourable prospects for the secondary crops.

Aggregate production of paddy rice is forecast at 694.3 million tonnes, 3 percent above the five-year average, on both area and yield increases. Record or near-record outputs are forecast in **Bangladesh**, **Cambodia**, **India**, **Pakistan** and **the Philippines.** Near-average outturns are forecast in **Thailand, China (mainland)** and **Viet Nam**. By contrast, in **Nepal,** paddy production is pegged at 5.1 million tonnes, its lowest level in five years, due to unseasonal rains in October across several provinces that affected yields when crops were almost ready to be harvested. Similarly, below-average harvests are forecast in **Myanmar**, due to both area and yield contractions, in **Indonesia** and in **Bhutan**, where farmers shifted some paddy land to more profitable food crops, including vegetables. In **Japan** and **Malaysia**, the 2021 paddy outputs are seen to decrease compared with the previous five-year averages.

Aggregate maize production is forecast at 366.5 million tonnes in 2021, 5 percent above the five-year average. Most countries harvested record or near-record outputs owing to area expansions that were underpinned by strong demand for feed. The largest year on year production gains were registered in **China (mainland)**, following above-average plantings and near-record yields. Similarly, bumper harvests were obtained in **Bangladesh**, **India**, **Indonesia**, **Myanmar** and **the Philippines**. By contrast, below-average outputs were harvested in **Sri Lanka**, due to limited supplies of agrochemicals, and in **Viet Nam**, where farmers planted less maize for the second consecutive year due to the relatively lower prices of the grain compared to other crops.

The subregional 2021 aggregate wheat production, harvested during the first half of last year, is estimated at a record high of 278.8 million tonnes.

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
Far East	263.9	272.2	278.8	376.7	385.6	396.5	674.7	686.2	694.3	1 315.3	1 344.0	1 369.7	+1.9
Bangladesh	1.2	1.0	1.3	3.3	4.0	4.7	53.9	56.1	56.5	58.4	61.1	62.5	+2.4
Cambodia	0.0	0.0	0.0	1.0	0.9	0.9	10.7	11.1	11.6	11.6	12.0	12.5	+4.6
China (mainland)	133.4	134.2	137.0	269.4	269.9	281.7	211.5	211.9	212.8	614.2	616.0	631.5	+2.5
India	100.4	107.9	109.6	46.4	51.4	50.1	174.6	186.5	189.4	321.5	345.8	349.0	+1.0
Japan	0.9	0.9	0.9	0.2	0.2	0.2	10.7	10.5	10.5	11.8	11.6	11.7	+0.6
Myanmar	0.1	0.1	0.1	2.5	2.9	2.8	26.1	25.3	24.8	28.8	28.3	27.7	-2.0
Nepal	2.0	2.2	2.1	2.9	3.1	3.1	5.4	5.6	5.1	10.4	10.9	10.3	-5.4
Pakistan	25.4	25.2	27.3	7.5	8.7	8.5	11.2	12.6	13.3	44.1	46.6	49.1	+5.4
Philippines	0.0	0.0	0.0	7.8	8.1	8.0	19.0	19.7	19.8	26.8	27.8	27.8	-0.1
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.2	4.7	5.2	5.4	4.9	5.4	+10.2
Sri Lanka	0.0	0.0	0.0	0.3	0.4	0.2	4.1	5.1	5.1	4.4	5.5	5.4	-1.8
Thailand	0.0	0.0	0.0	4.9	5.0	5.0	31.1	29.9	30.8	36.0	34.9	35.8	+2.6
Viet Nam	0.0	0.0	0.0	4.9	4.6	4.5	43.2	42.8	43.9	48.2	47.3	48.4	+2.2

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

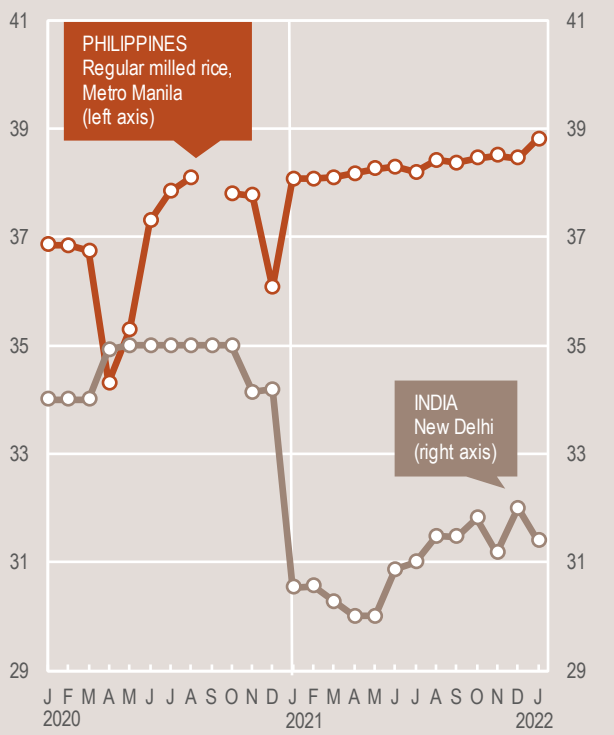
Cereal trade forecast well above the average in 2021/22

Aggregate cereal import requirement in the 2021/22 marketing year is forecast at 177 million tonnes (rice in milled terms), slightly below last year's record but still well above the five-year average. The large import needs mostly reflect strong demand for coarse grains for feed use, particularly from **China (mainland)** following the recovery in pork production after the African Swine Fever (ASF) outbreaks in 2018 and 2019, and also driven by continuing growth of the poultry, dairy and starch sectors. The subregion's total coarse grain import requirement is forecast at 102.5 million tonnes, almost 40 percent above the five-year average. The subregion's wheat import needs are forecast at a high level of 57.5 million tonnes, reflecting strong import demand by **China (mainland)** where wheat is increasingly used for feed as a substitute for maize. Similarly, large wheat imports are forecast in **Bangladesh**, **Malaysia**, **the Philippines** and **Pakistan**, traditionally a wheat exporting country, where the government and traders aim to boost domestic supply amid high domestic prices. In the 2022 calendar year, imports of rice are forecast at 15 million tonnes, 15 percent below the 2021 level, while exports are expected to reach 45.3 million tonnes, up nearly 3 percent from the level in 2021, reflecting large availabilities in the main exporting countries.

Domestic prices of rice and wheat flour reached record or near-record levels in Sri Lanka

Domestic prices of rice showed mixed trends between November 2021 and January 2022 and were below or close to their year-earlier levels in most countries of the subregion. In **Sri Lanka**, however, domestic rice prices increased steeply since September 2021 and were at record highs in January 2022, more than 55 percent above their year-earlier levels. The increases were underpinned by the steep depreciation of the national currency and production concerns regarding the 2022 main "Maha" paddy crop. Similarly, prices of a wide range of imported food items, including sugar, dried milk and pulses, also increased since last September and were at high levels in January 2022. Prices of wheat flour, another food staple, reached record high levels in January and were about 55 percent higher year on year. In **Viet Nam**, after steady declines throughout most of 2021, prices of rice firmed in January, just before the harvest of the 2022 main "winter-spring" crop and were about 20 percent lower year on year. In **India**, prices of rice were stable or increased, mostly supported by ongoing government procurement activities. Similarly, prices were generally stable

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	4 109	6 157	5 557	-9.7	+35.2
Imports	74 943	109 354	102 593	-6.2	+36.9
Production	376 669	385 648	396 543	+2.8	+5.3
Rice (millled)					
Exports	39 672	44 083	45 263	+2.7	+14.1
Imports	14 563	17 584	14 974	-14.8	+2.8
Production	448 923	456 983	462 345	+1.2	+3.0
Wheat					
Exports	2 577	3 569	7 503	+110.2	+191.2
Imports	53 921	59 451	57 510	-3.3	+6.7
Production	263 854	272 156	278 836	+2.5	+5.7

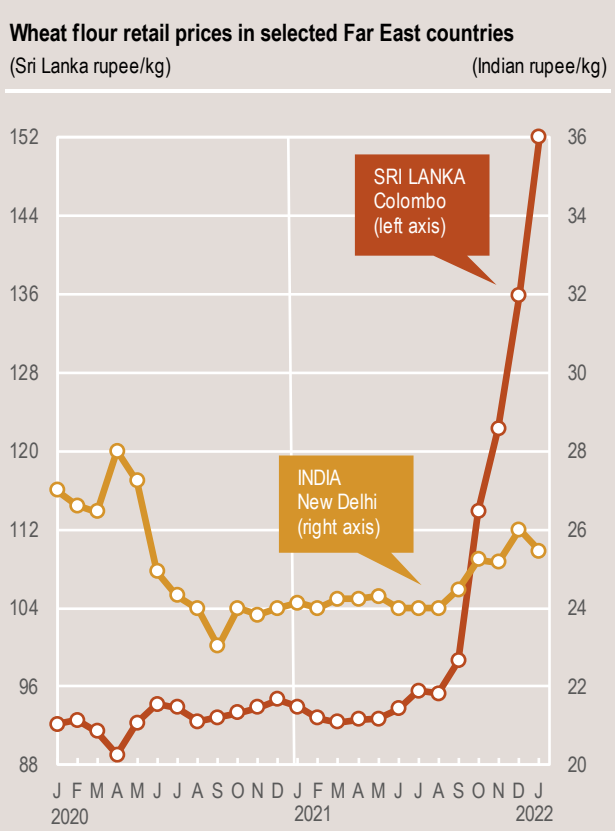
Notes: Marketing year July/June for most countries. Rice trade figures are for the second year shown.

in **Cambodia** and **China (mainland)**, reflecting adequate supplies from the 2021 harvests. In **Myanmar**, prices decreased for the third consecutive month from the high levels reached in October 2021, reflecting improved availabilities from the 2021 main season harvest. In **Thailand**, by contrast, domestic rice prices increased for the fourth consecutive month in January but were nonetheless more than 10 percent below their year-earlier levels after the decreases in 2021. Prices of wheat and wheat flour were mostly stable in **China (mainland)** and **India**, due to favourable prospects for the 2022 crops. Prices decreased in **Bangladesh** following adequate imports but were still higher on a yearly basis reflecting increases in the second part of 2021 due to a slowdown in imports.

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

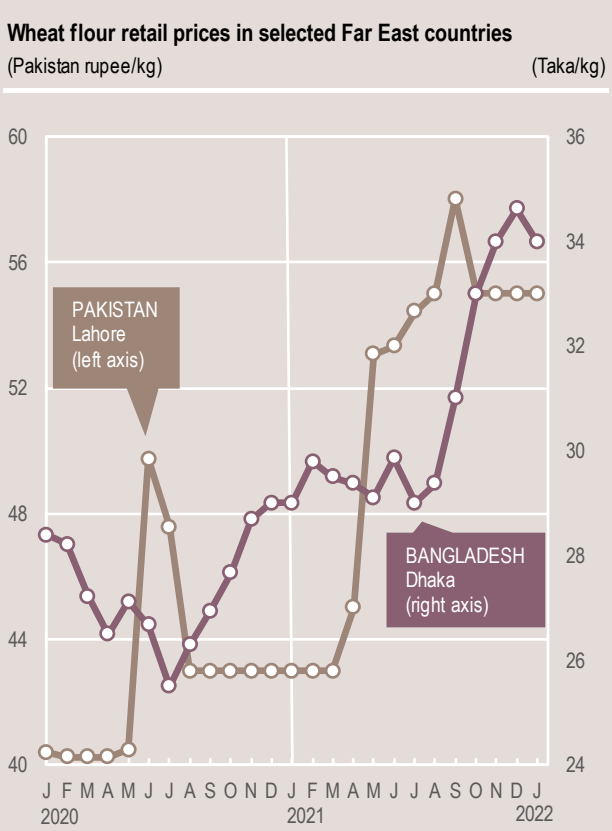
Although food security conditions are generally good across the subregion, the COVID-19 pandemic continues to have a negative impact on the livelihoods of a large number of people, reflecting income losses, reduction in remittances and high food prices in some countries. In **Pakistan**, following the Taliban takeover of Afghanistan on 15 August 2021, about 120 000 people fled to Pakistan, adding to the already existing 1.4 million registered Afghan refugees (as of June 2021, UNHCR) sheltering in the country. According to the latest IPC analysis, about 4.66 million people (25 percent of the population analysed) are estimated to face high levels of acute food insecurity, IPC Phase 3 (Crisis) or above, through to April 2022 in 25 districts analysed in Balochistan, Sindh and Khyber Pakhtunkhwa provinces. In **Bangladesh**, the food security situation of about 860 000 Rohingya refugees as well as the host communities, has severely deteriorated since the start of the COVID-19 pandemic. In **Myanmar**, the political crisis following the military takeover in February 2021 has further compromised the already fragile food security situation of Rohingya's internally displaced persons. In **the Democratic People's Republic of Korea**, the persisting economic constraints, exacerbated by the impact of the COVID-19 pandemic, have contributed to worsening the food insecurity situation, with large numbers of people suffering from low levels of food consumption and relying on a very poor dietary diversity. In **Sri Lanka**, since the beginning of 2021 a serious economic downturn, caused by high inflation and dwindling foreign currency reserves as revenues from merchandise exports and from the tourist sector were severely affected by the containment measures related to the COVID-19 pandemic. As a result, the national currency depreciated sharply, leading to a significant rise in domestic prices of both imported and locally produced food commodities. The high prices are severely affecting access to food, amid widespread income losses and reduced purchasing power related to the effects of the COVID-19 pandemic.

Wheat flour retail prices in selected Far East countries



Sources: Ministry of Consumer Affairs, India; Department of Census and Statistics, Sri Lanka.

Wheat flour retail prices in selected Far East countries



Sources: Bureau of Statistics, Pakistan; Management Information System and Monitoring, Bangladesh.

NEAR EAST

Despite recent improvements, sustained rainfall for the rest of the season is still needed

Planting of the 2022 winter grain crops, for harvest from May 2022, finished in January. Although rainfall deficits marked the season from its onset to mid-December 2021 across most of the subregion, above-average precipitation amounts in late December and early January improved crop prospects. However, pockets of dry areas, such as parts of Hassakeh, an important cereal-producing region in eastern **Syrian Arab Republic**, remain present and continued rainfall is needed for the rest of the season to sustain output. A rare period of snowfall in **Jordan**, **the Syrian Arab Republic** and the Kurdistan Region of **Iraq** in the second decade of January 2022 improved soil moisture, but it caused also damages to fruit trees and vegetable crops, and endangered many internally displaced people residing in temporary camps.

In **Afghanistan,** seasonal rainfall up to January 2022 was affected by La Niña conditions that resulted in drier-than-average conditions. Although recent improved precipitation contributed to an increased snow accumulation in southwest and southern parts of the country, insufficient snowpack prevailed in northeast and central highlands as of mid-February. Lack of snow cover constrains the availability of irrigation water for spring crops. In order to compensate for potential drought-induced winter crop losses, farmers may decide to increase the planted area of spring wheat, if rainfall is sufficient and inputs are available and accessible.

Sharp increases of international prices of fertilizers are likely to result in reduced application rates and could curb crop yields. Furthermore, in countries experiencing difficult socioeconomic circumstances due to conflicts or economic crises, including **Afghanistan**, **the Syrian Arab Republic**, **Yemen** and **Lebanon**, farmers' access to inputs is likely to be constrained by lack of liquidity.

The preliminary forecast for wheat production in **Turkey** points to a slightly below-average output of 19 million tonnes in 2022, assuming favourable weather conditions for the remainder of the season, and a near-average production of 13 million tonnes is foreseen in **the Islamic Republic of Iran.**

Below-average cereal production in 2021

The total cereal production in 2021 is estimated at 60.5 million tonnes, about 17 percent below the average and about 25 percent below the previous year's level, reflecting drought conditions in all the major cereal producers. In **Turkey**, the total 2021 cereal production is officially estimated at 32 million tonnes, about 10 percent below the average and 14 percent below the previous year's harvest. The largest production decline in the subregion was reported in **the Syrian Arab Republic** where the 2021 wheat and barley outputs were over 50 percent below the average due to erratic rains, prohibitively expensive inputs and lack of fuel to operate irrigation pumps.

Subregional cereal import requirements in the 2021/22 (July/June) marketing year are forecast at 81.4 million tonnes, about 13 percent above the average. The wheat import requirement is estimated at 38.4 million tonnes, about 27 percent above the average, reflecting rising demand due to population growth and declining domestic production.

Large number of people remain food insecure

Lingering conflicts, high international commodity prices, economic downturns and reduced livelihood opportunities continue to worsen food insecurity conditions in many countries of the subregion.

In **Afghanistan**, according to the latest IPC analysis, the number of people in IPC Phase 3 (Crisis) or above is projected to increase to 22.8 million between November 2021 and March 2022, about 35 percent more than during the same period in 2020/21 (16.9 million), including 8.7 million in IPC Phase 4 (Emergency). The substantial number of people in need of assistance, the highest on record, reflects the combined effects of drought, conflict and economic downturn.

In **Yemen**, in June 2021, despite the delivery of humanitarian assistance, the number of food insecure people was estimated to have increased from 13.5 million to 16.2 million, including 11 million in IPC Phase 3 (Crisis), 5 million in IPC Phase 4 (Emergency) and 47 000 in IPC Phase 5 (Catastrophe). In **the Syrian Arab Republic**, the latest nationwide food security assessment indicates that

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
Near East	45.3	49.5	36.8	22.3	25.7	18.7	5.3	6.0	5.1	72.9	81.1	60.5	-25.4
Afghanistan	4.5	5.2	3.9	0.4	0.4	0.3	0.6	0.7	0.5	5.4	6.3	4.7	-25.0
Iran (Islamic Republic of)	14.3	14.0	9.0	4.3	4.3	3.3	3.5	3.9	3.1	22.1	22.2	15.4	-30.5
Iraq	3.8	6.2	4.2	1.2	2.1	0.6	0.0	0.5	0.5	5.2	8.8	5.2	-40.4
Turkey	20.3	20.5	17.7	14.2	15.6	13.3	0.9	1.0	1.0	35.5	37.1	32.0	-13.7

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

about 12.4 million people (60 percent of the overall population) were food insecure in 2020, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and a rapidly worsening economy. In both countries, the food insecurity situation likely deteriorated further in 2022 due to difficult macroeconomic conditions.

In **Lebanon**, the United Nations Economic and Social Commission for Western Asia has recently estimated that over 80 percent of the population was in a multi-dimensional poverty condition in 2021, up from 42 percent in 2019. Although no systematic IPC-type assessments are conducted in the country, according to World Food Programme surveys, it is estimated that in 2021 food insecurity was affecting about 22 percent of the national population as well as 50 percent of the Syrian refugees and one-third of the refugees of other nationalities that are hosted in the country.

CIS IN ASIA

Expected poor rains likely to negatively affect the 2022 winter cereal crops

Planting of the 2022 winter cereals, to be harvested between June and September, finalized in November 2021 and the total area planted in the subregion[3] is estimated to be near the five-year average level. Overall satisfactory precipitation levels since November 2021 brought adequate snow volumes in the mountain areas of **Armenia**, **Kyrgyzstan** and **Tajikistan**, protecting crops from winterkill in case of severe frosts. In southern areas of **Kazakhstan**, **Turkmenistan** and **Uzbekistan**, cumulative precipitation amounts were below average since the onset of the rainy season in October 2021 until December. Although rainfall amounts increased in January 2022 and helped to reduce soil moisture deficits, adequate precipitation levels in the coming months are needed across the subregion for proper crop development and to replenish water reservoirs to be used for irrigation during the summer months (June–September). However, according to weather forecasts, there is a high likelihood that rainfall levels will be below average until April 2022. In particular, very low precipitation amounts are forecast in large areas of **Tajikistan**, **Turkmenistan**, **Uzbekistan** and in parts of **Kazakhstan**, curtailing production prospects of the 2022 winter cereal crops.

Below-average wheat production obtained in 2021

The aggregate subregional cereal output in 2021 is estimated at a below-average level of 31 million tonnes. Production of

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
CIS in Asia	25.0	25.3	21.6	9.1	9.4	8.6	35.2	35.8	31.3	-12.5
Armenia	0.2	0.1	0.1	0.1	0.1	0.1	0.3	0.2	0.2	-6.4
Azerbaijan	1.9	1.8	1.8	1.2	1.3	1.3	3.1	3.2	3.1	-1.6
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	-7.6
Kazakhstan	13.9	14.3	11.8	4.9	5.0	4.6	19.3	19.8	16.9	-14.4
Kyrgyzstan	0.6	0.6	0.4	1.1	1.2	0.8	1.8	1.9	1.3	-34.2
Tajikistan	0.9	0.8	0.9	0.4	0.3	0.4	1.3	1.3	1.4	+9.5
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

Notes: 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.

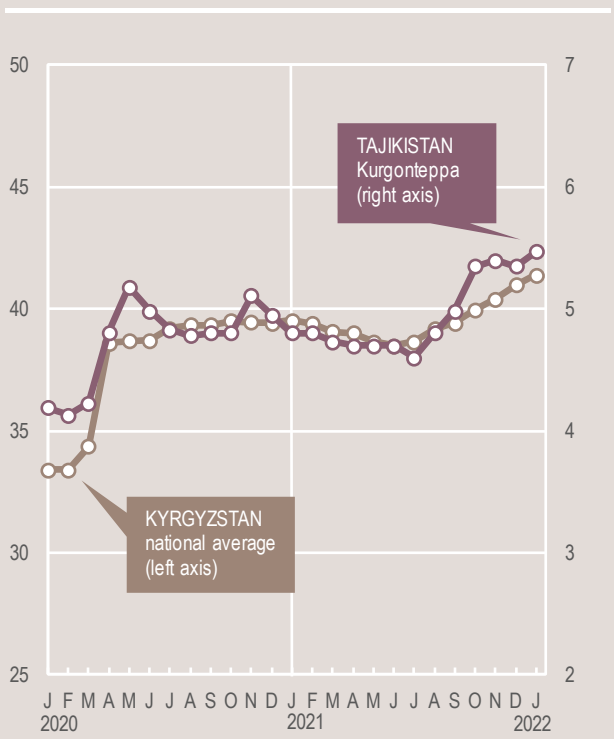
wheat, which accounts for more than 70 percent of the total cereal output, is estimated at 22 million tonnes, 13 percent below the average. In **Kazakhstan**, the main wheat producer in the subregion, the 2021 domestic wheat output is estimated at a below-average 11.8 million tonnes, due to insufficient precipitation amounts and higher-than-average temperatures late in the season, while low outputs were also recorded in **Kyrgyzstan**, **Turkmenistan** and **Uzbekistan**. The aggregate subregional coarse grain production is estimated at 8.6 million tonnes in 2021, 5 percent below the five-year average, mainly due to reduced outputs of barley in **Kazakhstan** and **Kyrgyzstan**.

Export and domestic prices of wheat flour higher than a year before

In **Kazakhstan**, although export prices of wheat flour declined slightly between October and December 2021, they were well above their year-earlier levels following the sharp increases recorded in the third quarter of last year, driven by the lower outputs. In January 2022, prices increased slightly, mainly due to the strong demand by importing countries.

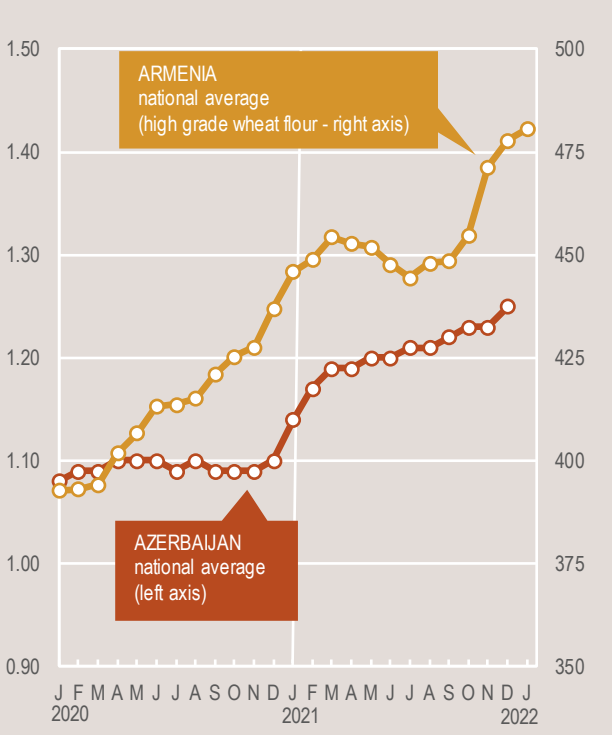
In the importing countries of the subregion, domestic retail prices of wheat flour showed mixed trends in recent months but were broadly above their year-earlier levels. Prices remained mostly stable between September and December 2021 (last available data) in **Azerbaijan**, where duties on wheat exports have been renewed until May 2022 (FPMA Food Policy). In **Kyrgyzstan**, following the low wheat output harvested in 2021, retail prices of wheat flour increased between June 2021 and January 2022, reaching higher year-on-year levels. Similarly, in **Armenia**, prices had increased gradually since October 2021 in line with seasonal trends and, in January, they were above the year-earlier values. Between July and November 2021, prices of wheat flour rose sharply in **Tajikistan** and, in January 2022, they were higher than a year before, reflecting the high export prices from Kazakhstan, the main wheat supplier to the country.

Retail wheat flour prices in selected CIS in Asia countries



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



Sources: State Statistical Committee of the Republic of Azerbaijan; National Statistical Service of the Republic of Armenia.

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).

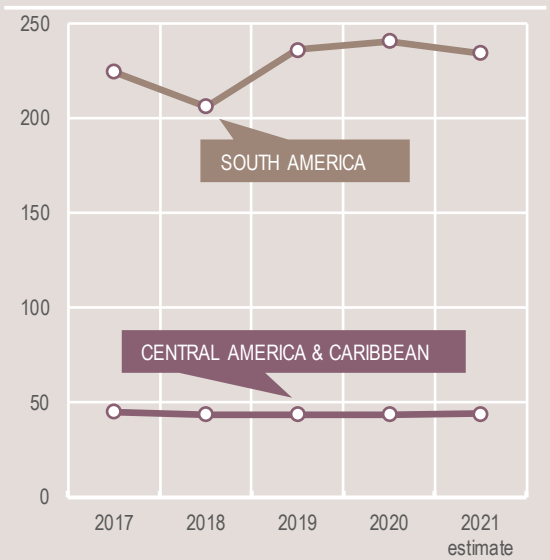
Source: GIEWS, 2022. *Crop Prospects and Food Situation #1* [online]. [Cited 3 February 2022], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

Production Overview

Cereal production in 2021 is estimated an above-average level of 278 million tonnes, 6 percent higher than the five-year average. The large outturn is the result of record wheat outputs in South America, while maize production was also above average but declined compared to the previous two years. In Central America, the 2021 maize output is estimated at a near-average level.

Regarding the 2022 cereal crops, all-time high maize plantings are estimated in the leading South American producing countries, Argentina and Brazil, and production is therefore foreseen to remain at a well above-average level. In Central America, early indications in Mexico point to an above-average planted area to wheat in 2022, underpinned by remunerative prices.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat plantings expected to rebound in 2022

In **Mexico**, planting of the 2022 main season (mainly irrigated) wheat crop was nearing completion by the end of February. According to official estimates, the area planted is expected to rebound from its low level of the last two years and reach an above-average level, spurred by high domestic prices. However, yield prospects are uncertain due to hotter-than-average conditions forecast for the March–May 2022 period in the key producing northwestern region.

With regard to Mexico's 2022 maize crop, planting of the first minor season crop concluded in February and the area sown is estimated at an average level, in part, reflecting the effects of high production costs that cut into otherwise favourable profit expectations owing to elevated grain prices and government incentive schemes. In late 2021, the government announced its intention to purchase the maize produced in the minor season, the harvest will take place in the second quarter of 2022, from medium size farms (up to 50 hectares) in Sinaloa, Sonora and Tamaulipas states, at a rate of MXN 200 (about USD 10) per tonne.

Maize output in 2021 estimated at average level

The subregional 2021 maize output is forecast at a near-average level of 32 million tonnes. In **Mexico**, the leading producer in the subregion, harvesting of the 2021 main season crop was completed in January 2022 and the aggregate maize outturn is officially estimated at an average level of 27.5 million tonnes. Elsewhere, maize production is officially estimated to be above average in **El Salvador**, while production is foreseen to be slightly below the five-year average in **Nicaragua**, where the harvest is still ongoing, resting on reduced plantings. Maize production in **Guatemala** is estimated at a near-average level and in **Honduras**, despite the prolonged dry spells that affected crops in the southeastern region.

In **Haiti**, harvesting of the 2021 third season maize crop will conclude in March and, according to satellite imagery, crop conditions were generally unfavourable prior to the harvest period, reflecting reduced rains during the last quarter of 2021. In combination with low plantings and reduced yields in the second and third seasons, which were affected by natural disasters, the national aggregate cereal output in 2021 is expected at a below-average level. Abundant precipitation since mid-January 2022 has created generally conducive conditions for land preparation and planting of the 2022 first season cereal crops. In **the Dominican Republic**, the 2021 aggregate paddy output (mainly irrigated) is estimated at an above-average level of 1.1 million tonnes on account of record-high plantings.

Cereal imports forecast at high levels in 2021/22

Cereal imports in the subregion have been rising since 2014, supported by the strong demand of yellow maize for feed and wheat for human consumption. Cereal import requirements are forecast at an above-average level of 37.5 million tonnes in the 2021/22 marketing year (September/August).

Maize and bean prices higher year on year

As of end-January 2022, prices of maize and beans were above their levels of a year earlier, underpinned by high production and transportation costs. In **Nicaragua**, prices declined between November 2021 and January 2022 owing to improved market availabilities from the minor season harvest, but they were still well above their values a year earlier. In **Mexico**, maize prices were stable or weakened with the ongoing main harvest. By contrast, in **Guatemala**, prices of white maize increased between November 2021 and January 2022, owing to reduced supplies, including low imports from Mexico. Maize prices also rose during the same period in **El Salvador** and **Honduras**.

Despite improved supplies from the second season harvest, prices of beans increased in **Nicaragua** and **El Salvador**

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
Central America and the Caribbean	3.3	3.0	3.3	38.2	37.8	37.7	2.9	2.8	2.9	44.4	43.6	43.9	+0.6
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	+0.7
Guatemala	0.0	0.0	0.0	2.0	2.0	2.0	0.0	0.0	0.0	2.0	2.0	2.0	+2.2
Honduras	0.0	0.0	0.0	0.7	0.7	0.7	0.1	0.0	0.1	0.7	0.7	0.7	-2.0
Mexico	3.3	3.0	3.3	33.3	33.1	32.9	0.3	0.3	0.3	36.9	36.3	36.5	+0.5
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.4	0.4	0.4	0.4	0.9	0.8	0.8	+0.9

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

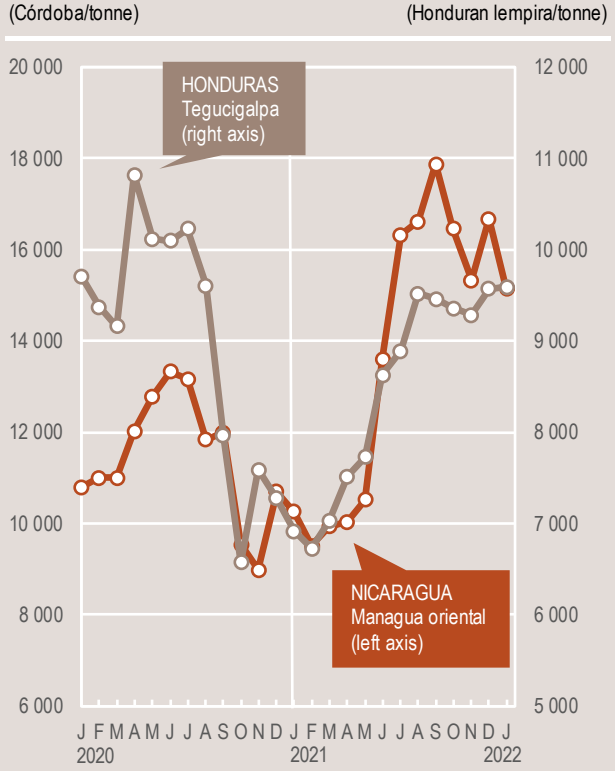
in the three months to January 2022, reflecting high production and transportation costs. In January 2022, increased market availabilities stabilized prices in **Honduras** and **Guatemala,** and contributed to a weakening of prices in **Mexico**.

In **Haiti**, prices of locally produced maize and black beans generally strengthened during the last quarter of 2021, driven by reduced supplies from the below-average harvests in 2021 and increasing transportation costs. Prices of imported rice also rose in most markets following the steady depreciation of the national currency, which lost 40 percent of its value against the US dollar in 2021. An increase in violent incidents since 2020 continued to cause sporadic disruptions to market operations, particularly in the capital, Port-au-Price.

Food insecurity projected to worsen in the March–May period

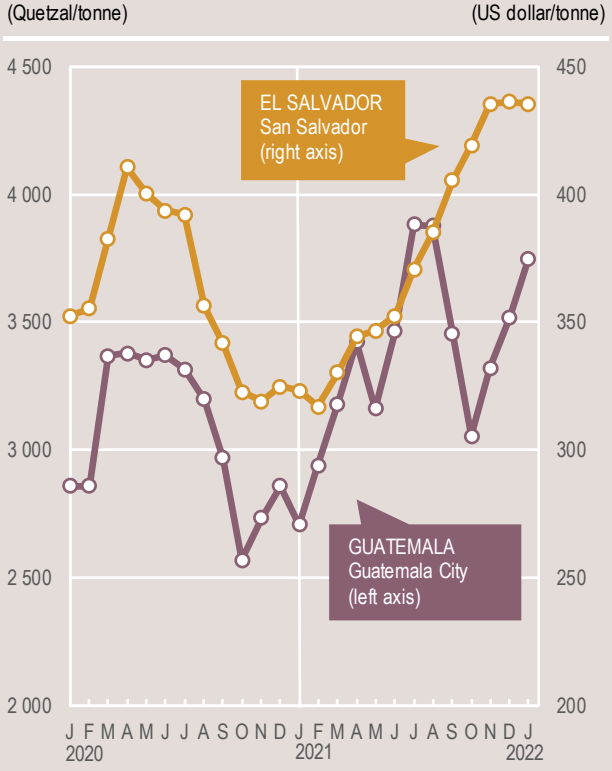
According to the latest IPC analysis, about 7.8 million people are foreseen to be food insecure and require urgent assistance between March and May 2022, with 4.5 million in **Haiti**, 2.4 million in **Honduras** and 907 000 in **El Salvador**. This reflects a generalized worsening of food insecurity compared to conditions between December 2021 and February 2022, caused by tighter supplies of staple foods and an expected drop in seasonal farm labour opportunities in El Salvador and Honduras. In southeastern **Honduras** and **Haiti**, where dry weather conditions resulted in localized but significant crop losses, food reserves are anticipated to be depleted earlier than usual. In combination with high food prices, which diminish the households' purchasing power, vulnerable households are expected to face food availability and access constraints. In **Haiti**, the lack of income-earning opportunities, amid worsening insecurity and difficult macroeconomic conditions, has contributed to heightening of food insecurity.

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

Large maize plantings likely to result in an above-average harvest in 2022

Harvesting of the 2022 maize crop is expected to start from March in Argentina, Chile and Uruguay. In **Argentina**, the area sown is officially estimated at a record high of 10.1 million hectares, a third consecutive yearly increase as farmers responded positively to the high domestic grain prices and strong export demand. Improved rainfall between January and February favoured planted crops that were at critical vegetative and flowering stages in central and eastern areas. Despite concerns over the impact of reduced rains earlier in the season, the 2022 maize output is forecast at a well above-average level, underpinned by a record maize acreage. In **Brazil**, harvesting of the 2022 first minor season maize crop is underway and yields in the key producing southern areas were reported to be low due to below-average rainfall during the last quarter of 2021. The main season maize crop, which accounts for about 75 percent of the annual production, is at emergence and vegetative growing stages amid generally conducive weather conditions. As of mid-February, aggregate 2022 maize production, including a projection for the minor third season, is officially forecast at a record high of 112 million tonnes, mostly driven by an all-time high planted area. By contrast, the area sown with maize is estimated at a below-average level in **Chile**. As of mid-February, satellite imagery indicates poor vegetation conditions in the major producing O'Higgins and Maule regions, reflecting prolonged dry spells since October 2021. In **Uruguay**, while the planted area is estimated to be well above the average due to high domestic prices, production prospects remain uncertain as the early-planted crops were affected by reduced rainfall amounts at the end of 2021. In **Paraguay**, planting of the 2022 main season maize crop started a month later than normal at the end of January, owing to rainfall shortages and elevated temperature between mid-November 2021 and mid-January 2021, and the acreage is estimated to be similar to the last year's below-average level. Weather forecasts point to a higher-than-normal likelihood of below-average rainfall during the March–May period, raising concerns on yields.

In northern parts of the subregion, planting of the 2022 first yellow maize crop will finalize in April in **Colombia** and **Peru**. Despite the high costs of agricultural inputs, plantings are expected to be slightly above the average, driven by elevated domestic prices of the grains. In **Ecuador** and **the Plurinational State of Bolivia**, the main season maize crop, to be harvested from April, is at vegetative and flowering stages and crop conditions are mostly favourable.

Harvesting of the 2022 paddy crop is set to start in March. In **Brazil**, official forecasts put the 2022 paddy output at 10.5 million tonnes, 8 percent below the average, due to a contraction in plantings and reduced yields. The reduction in the area sown reflects lower year-on-year prices at planting time and weak export demand during the second half of 2021. Similarly, plantings in **Colombia** and **Ecuador** declined due to the low rice prices, underpinned by large domestic supplies. In **Paraguay** and **Uruguay**, reduced rain amounts at the end of 2021 affected crops at vegetative and flowering stages, with negative consequences on yields.

Cereal production in 2021 estimated at above-average level

The 2021 subregional cereal output is estimated at 234 million tonnes,

Table 16. South America cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
South America	27.9	27.6	33.3	165.3	188.0	175.5	24.5	24.9	25.5	217.8	240.5	234.3	-2.6
Argentina	18.7	17.6	22.1	56.6	65.5	69.8	1.3	1.2	1.5	76.6	84.3	93.3	+10.7
Brazil	5.6	6.2	7.7	92.1	106.3	90.8	11.3	11.2	11.8	109.0	123.7	110.2	-10.9
Colombia	0.0	0.0	0.0	1.4	1.3	1.5	2.7	3.0	2.9	4.1	4.3	4.3	+0.0
Paraguay	1.1	0.9	0.7	5.5	5.9	4.2	1.0	1.2	1.2	7.6	8.1	6.1	-24.1
Peru	0.2	0.2	0.2	1.8	1.7	1.9	3.3	3.4	3.5	5.2	5.3	5.5	+3.8

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

approximately 8 percent above the five-year average. The bumper production reflects an all-time high wheat output, estimated at 33 million tonnes, driven by large plantings in **Argentina**, **Brazil** and **Uruguay**. Maize production in the subregion is estimated at an above-average level of 159 million tonnes in 2021, reflecting bumper outputs in **Argentina** and **Peru** more than compensated for below-average outputs in **Brazil** and **Paraguay**.

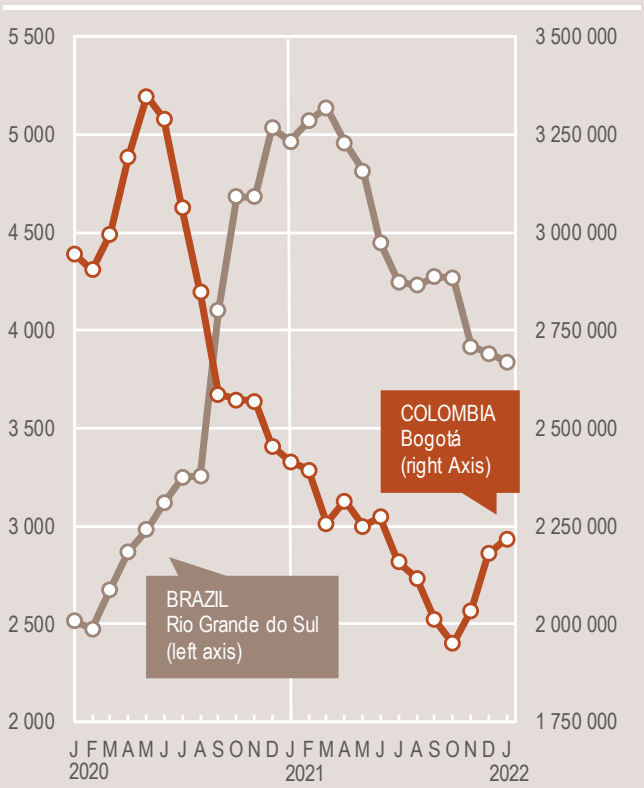
Above-average cereal exports estimated in 2021/22

Aggregate cereal exports in the 2021/22 marketing year (March/February) are estimated at an above-average level of 85 million tonnes, a significant drop compared to the previous two years, mainly due to the sharp decline in exportable maize supplies in **Brazil**. Rice exports are estimated to be 10 percent below the five-year average, mainly reflecting weak export demand. By contrast, wheat exports are expected at a near-record level owing to the bumper output harvested in 2021 and robust export demand.

Maize and wheat prices up from a year earlier

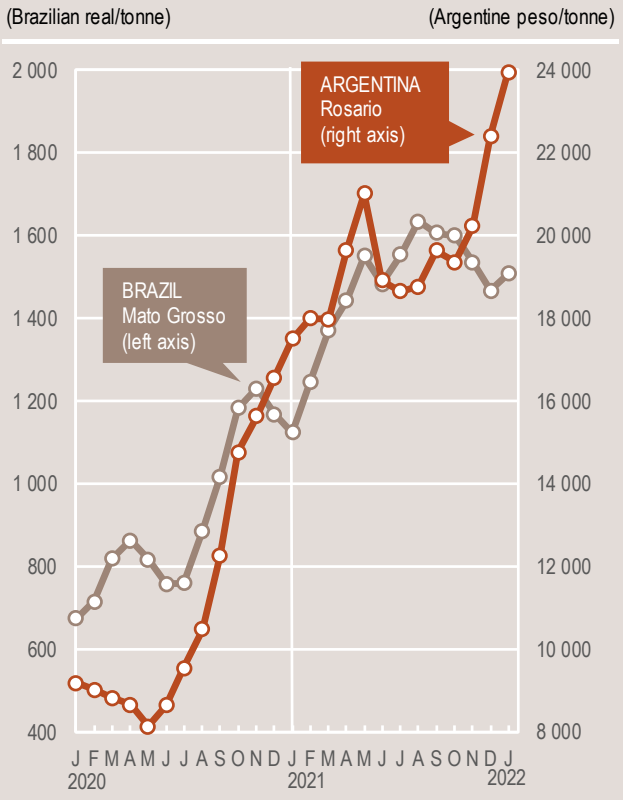
In most countries of the subregion, prices of yellow maize and wheat were at higher year-on-year levels as of January 2022 due to high production and transportation costs, combined with trends in the international market. In **Argentina**, prices of wheat grain remained firm between November 2021 and January 2022, despite the bumper harvest completed in January, due to strong export demand. Prices of wheat generally increased between November 2021 and January 2022 in **Brazil**, **Chile** and **Uruguay**. In **Peru** and **Colombia**, which are net importers, prices

Wholesale rice prices in selected countries in South America



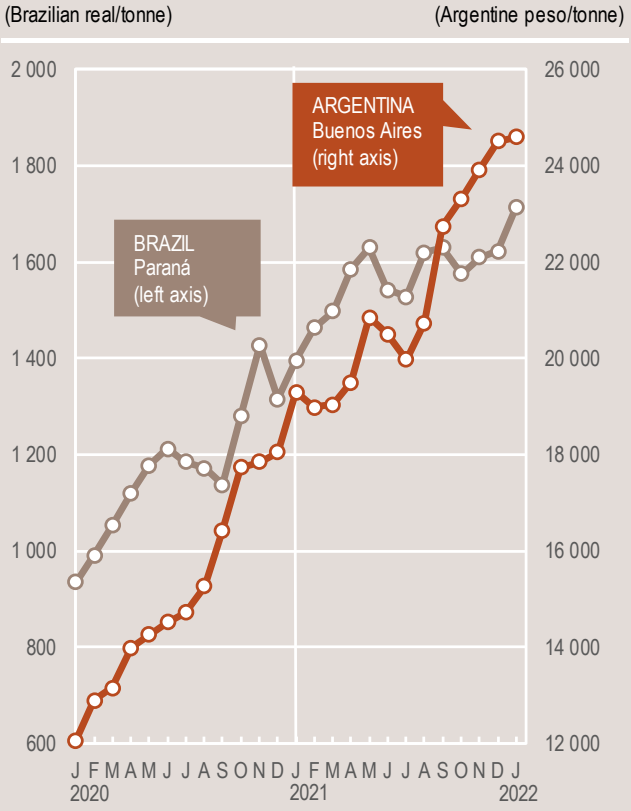
Sources: Departamento administrativo nacional de estadística (DANE), Colombia; Instituto de economía agrícola, Brazil.

Wholesale maize prices in selected countries in South America



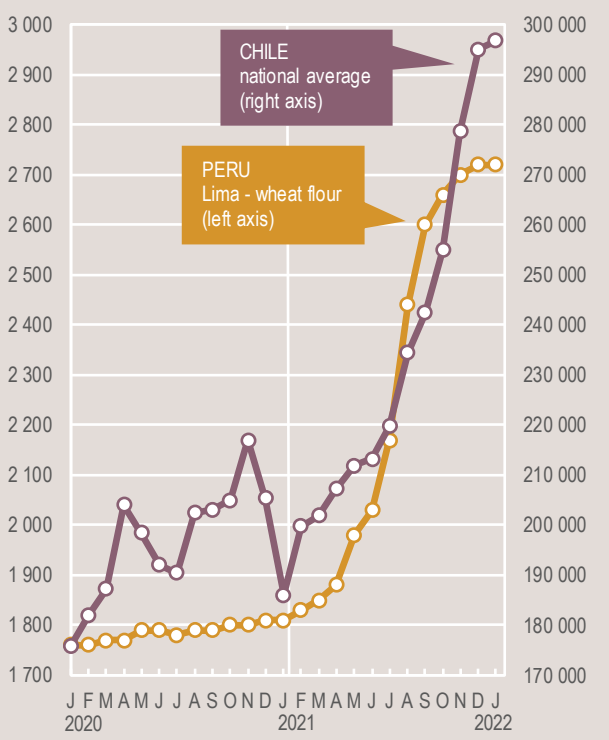
Sources: Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

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.

of wheat flour increased sharply during the same period on account of rising international quotations.

Prices of yellow maize in **Argentina** and **Brazil** increased between November 2021 and January 2022, pressured by concerns over dry weather conditions on production prospects. Prices strengthened in **Uruguay** and **Peru** in line with seasonal trends, while prices were overall stable, but at high levels, in **Colombia**.

Across the subregion, prices of rice were generally lower year on year in January 2022, reflecting weak export demand in **Brazil** and abundant supplies from the previous bumper harvests in **Colombia**, **Ecuador** and **Uruguay**. In **Peru**, prices were stable between November 2021 and January 2022 as improved market supplies from the recently completed minor harvest offset the upward pressure from increasing production and transportation costs.

About 3.5 million Venezuelan refugees and migrants in need of food assistance in 2022

In **the Bolivarian Republic of Venezuela**, the economy in 2022 is forecast to contract for the ninth consecutive year, although by a smaller rate compared to previous years. As of February 2022, the total number of Venezuelan refugees and migrants were estimated at 6.04 million people (about 22 percent of the population) and are mostly settled in Colombia (1.84 million), Peru (1.29 million), Ecuador (509 000) and Chile (448 000). According to the Inter-Agency Coordination Platform for Refugees and Migrants from **the Bolivarian Republic of Venezuela**, the number of Venezuelan refugees and migrants (in-destination) in need of food assistance is projected at about 3.5 million people in 2022.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of February 2022
Territories/boundaries**

NORTH AMERICA

Canada
Cereals (winter season): Dormant to vegetative

United States of America
Cereals (winter season): Vegetative

EUROPE

Northern Europe
Cereals (winter season): Dormant to vegetative

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

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

OCEANIA

Australia
Cereals (summer season): Harvesting

** See Terminology (*page 6*)

Source: GIEWS, 2022. *Crop Prospects and Food Situation #1* [online]. [Cited 3 February 2022], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

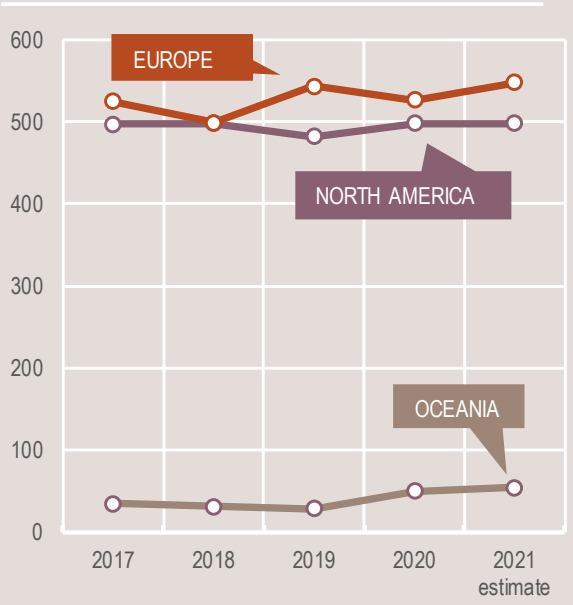
Production Overview

In the United States of America, a foreseen increase in total wheat plantings and a projected rise in yields following the drought-reduced levels in 2021, is expected to result in an above-average wheat output in 2022. In Canada, official forecasts point to a potentially large increase in wheat production in 2022 following the low output in the previous year.

In the European Union, production of wheat in 2022 is tentatively pegged at a below-average level due to a foreseen drop in yields relative to the high levels of 2021. In CIS Europe, increased precipitation amounts in recent months improved soil moisture levels in the Russian Federation and Ukraine, following dry conditions at the start of the 2022 winter cropping season.

In Australia, harvesting of the 2021 wheat crop recently concluded and production is estimated at a record high.

Cereal production
(million tonnes)



NORTH AMERICA

Wheat production forecast to recover to an above-average level in 2022

In **the United States of America**, total wheat plantings are forecast at an above-average level of 1.9 million hectares in 2022, underpinned by attractive farm gate prices. Although dry weather conditions are still prevalent across some of the main wheat-producing states, weather conditions are expected to improve in the spring and summer and, as a result, yields are forecast to increase from the low levels in 2021. Overall, total wheat production in 2022 is forecast at an above-average level of 53 million tonnes.

Planting of the coarse grain crops is expected to start in April and provisional forecasts indicate that the maize output could increase to a record high of 387 million tonnes.

In **Canada**, the bulk of the wheat crop is produced during the summer months, between April and October. Based on official projections, total wheat plantings are forecast at an above-average level of 9.85 million hectares in 2022, an increase of 7 percent compared to the previous year as farmers reacted positively to high grain prices. Assuming favourable weather conditions in the spring and summer period, total wheat production is forecast at an above-average level of 31 million tonnes, which would be a steep rebound from the output in 2021 that was affected by dry weather conditions.

EUROPE

EUROPEAN UNION

Generally favourable conditions for 2022 winter wheat crop

In the **European Union**, planting of the 2022 secondary spring wheat crop is underway and the aggregate area, including the main winter crop planted in the last quarter of 2021, is forecast at a slightly below-average level in 2022. Weather conditions have been mostly beneficial throughout the season, although drier-than-average conditions prevailed in southern parts of France, Portugal and Spain, and more rains are needed in the coming months to support crop growth. Overall, the 2022 wheat outturn is tentatively pegged at a below-average level of 133 million tonnes, a moderate decline compared to 2021 due to a foreseen drop in yields relative to the high levels of the previous year.

CIS IN EUROPE

Following early seasonal dryness, rainfall improved benefiting the 2022 winter cereal crops

Planting of the 2022 winter cereal crops, currently dormant and to be harvested between July and August, was completed last November over a slightly above-average area. Drier-than-average weather conditions in October 2021 reduced soil moisture levels and delayed planting in some regions of **the Russian Federation** and **Ukraine**. In the following months, adequate rainfall amounts supported the establishment of winter crops and the accumulation of a well-distributed snow cover is expected to adequately protect plants from freezing temperatures, and to secure ample moisture reserves for early spring (March–April), when plant growth resumes after dormancy. The escalation of the conflict, however, cast some uncertainty over the final production outcomes, as disruptions to services, damage to infrastructure and population displacements could prevent farmers from attending their fields, harvesting and marketing crops. In **the Republic of Moldova**, although abundant rainfall volumes in December reduced soil moisture deficits following poor earlier seasonal rains, adequate precipitation levels in the coming months are crucial for proper crop development. In **Belarus**, weather conditions have been generally favourable

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	5-yr Avg.	2020	2021 estim.	Change: 2021/2020 (%)
North America	85.3	84.9	66.4	407.4	403.0	423.4	9.4	10.3	8.7	502.1	498.3	498.5	+0.0
Canada	32.5	35.2	21.7	27.6	29.8	24.3	0.0	0.0	0.0	60.1	65.0	45.9	-29.3
United States of America	52.8	49.8	44.8	379.8	373.3	399.1	9.4	10.3	8.7	442.0	433.3	452.6	+4.4
Europe	257.5	255.0	269.6	259.6	267.2	274.5	4.1	4.1	3.8	521.1	526.4	548.0	+4.1
Belarus	2.4	2.8	2.4	4.8	5.5	5.3	0.0	0.0	0.0	7.1	8.4	7.7	-7.7
European Union[1]	143.4	126.7	138.6	157.8	157.1	157.2	2.9	2.9	2.7	304.1	286.8	298.6	+4.1
Russian Federation	78.4	85.9	75.9	41.9	42.9	39.8	1.1	1.1	1.1	121.3	130.0	116.8	-10.1
Serbia	2.7	2.9	3.5	7.3	8.6	7.0	0.0	0.0	0.0	10.0	11.4	10.5	-8.0
Ukraine	26.0	24.9	32.0	40.9	39.7	51.3	0.1	0.1	0.1	67.0	64.6	83.3	+28.9
Oceania	24.1	33.8	35.9	14.8	16.3	17.6	0.4	0.1	0.5	39.2	50.2	54.0	+7.6
Australia	23.6	33.3	35.4	14.2	15.7	17.0	0.4	0.1	0.5	38.2	49.1	52.9	+7.8

Notes: 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.

in most cropland areas since the beginning of the season.

Planting of the 2022 spring cereals, to be harvested between July and September, is expected to begin in April.

Above-average subregional cereal output obtained in 2021

The subregional cereal output is estimated at about 245 million tonnes in 2021, almost 20 percent above the five-year average level. The subregional wheat production is estimated at a slightly above-average level of 112 million tonnes, as a record-high output in **Ukraine** more than offset a reduced harvest in **the Russian Federation**. Production of maize is estimated at 58.5 million tonnes, 24 percent above the average due to large plantings and overall conducive weather conditions during the season across the subregion, while barley production is estimated at a near-average level of 28.8 million tonnes.

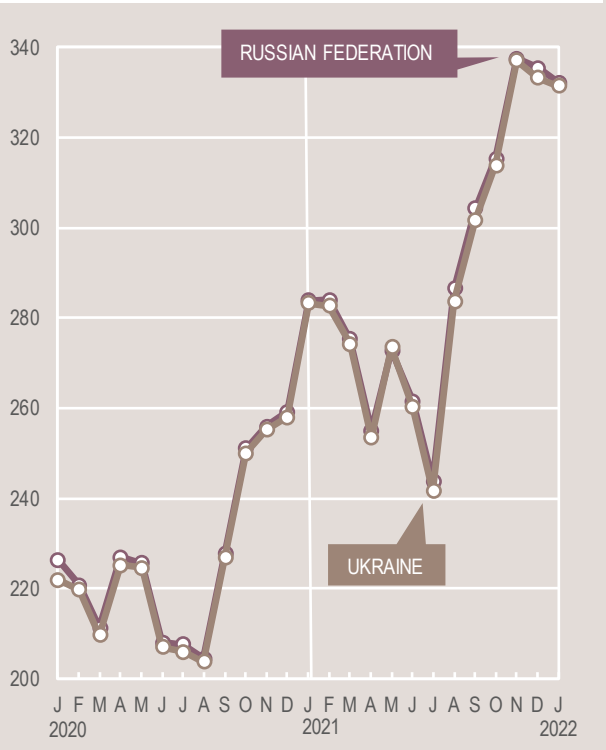
In **the Russian Federation**, wheat production, which on average accounts for about 70 percent of the total subregional grain output, is officially estimated to be just short of the five-year average at 75.9 million tonnes, due to unfavourable weather conditions in the key winter wheat producing Southern district. On account of the reduced domestic output and the introduction of an export quota from February to June 2022 (FPMA Food Policy), wheat exports from the Russian Federation are forecast at 33.5 million tonnes in the 2021/22 marketing year (July/June), 5 percent below the average volume. In **Ukraine**, the 2021 maize and wheat outputs are estimated at all-time highs of 40 million and 32 million tonnes, respectively, due to large plantings and overall favourable weather conditions. As a result, exports of maize and wheat in 2021/22 were earlier forecast at above-average levels of 33 million and 24 million tonnes, respectively. However, significant damage to infrastructure, particularly port and rail facilities, could curb the export capacity to ship grains.

Export prices of wheat reached a multi-year high in November 2021

In **the Russian Federation** and **Ukraine**, export prices of milling wheat increased by almost 40 percent between July and November 2021, reaching their highest levels since early 2013. The rise followed the prevailing trends in the international market, mostly due to strong buying interest from importing countries and limited supplies of high quality milling wheat at the global level. In December 2021 and January 2022, export prices of wheat remained mostly stable in both countries, as the effects of generally favourable production prospects tempered upward pressure from robust export demand in preceding months and concerns regarding the possible impact on wheat shipments in the Black Sea region owing to heightened tension between the Russian Federation and Ukraine.

In both countries, domestic wholesale prices of milling wheat also increased sharply between July and November 2021 and remained stable in December.

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



Source: International Grains Council.

In January, prices increased seasonally in **Ukraine**, albeit moderately, and reached a new record high, in nominal terms. In **the Russian Federation**, prices remained stable in the preceding two months and were about 6 percent higher year on year.

Conflict to aggravate food insecurity

The escalation of the conflict in **Ukraine** is expected to result in increased humanitarian needs within the country and in bordering countries where displaced population seek refuge. The conflict has raised serious risk of livelihood failure and consequently the potential loss of incomes, with implications for households' economic access to staple foods. In addition, disruptions to food markets may also lead to supply interruptions that would further weigh on food security conditions. Already, about 1.5 million people had been displaced, prior to the current escalation, as a result of the nearly eight-year conflict in eastern Ukraine, and some 1.1 million were in need of food and livelihood assistance and about 400 000 of them were estimated to be moderately-to-severely food insecure. The prevalence and severity of food insecurity will likely rise, particularly the longer the conflict persists and the more the affected areas increase.

OCEANIA

Substantial cereal output registered in 2021

In **Australia**, harvesting of the 2021 winter wheat and barley crops recently concluded. Wheat production is pegged at a new record high of 34.4 million tonnes in 2021 reflecting conducive weather conditions that pushed up yields to well above-average levels. However, there are concerns about the quality of the grains due to wet weather conditions. Outputs of coarse grains also increased in 2021, reflecting moderate upturns in acreages and yields. In total, cereal production is estimated at an above-average level of nearly 53 million tonnes in 2021.

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*	*36.4*	*36.7*	*37.3*	*37.1*
Coarse grains	*25.5*	*27.3*	*25.6*	*24.2*	*23.4*	*22.6*
Rice	*36.0*	*35.3*	*37.2*	*36.5*	*36.4*	*36.4*
Total cereals	***30.6***	***31.9***	***30.7***	***29.9***	***29.7***	***29.1***
Ratio of major cereal exporters' supplies to market requirements (%)[1]	*119.5*	*122.8*	*116.8*	*118.6*	*115.7*	*114.3*
Ratio of major exporters' stocks to their total disappearance (%)[2]						
Wheat	*18.0*	*21.0*	*18.1*	*15.5*	*15.5*	*15.2*
Coarse grains	*14.4*	*15.5*	*15.7*	*14.5*	*11.8*	*12.2*
Rice	*22.8*	*18.1*	*22.8*	*26.4*	*27.7*	*28.3*
Total cereals	***18.4***	***18.2***	***18.9***	***18.8***	***18.4***	***18.6***

	Average growth rate 2011-2020	2017	2018	2019	2020	2021
Annual growth in world cereal production (%)	*1.8*	*1.1*	*-1.8*	*2.4*	*2.3*	*0.7*
Annual growth in cereal production in the LIFDCs (%)	*3.2*	*1.6*	*4.3*	*2.9*	*4.0*	*-2.4*

	2018	2019	2020	2021*	Change 2021* over 2020*
Selected cereal price indices[3]					
Wheat	*95.3*	*100.7*	*132.1*	*151.2*	*27.3%*
Maize	*94.6*	*100.8*	*144.8*	*156.7*	*12.2%*
Rice	*101.5*	*110.2*	*105.8*	*102.0*	*-11.5%*

Source: FAO.

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

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

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

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

*January-February average.

Table A2. World cereal stocks

(million tonnes)

	2017	2018	2019	2020	2021 estimate	2022 forecast
TOTAL CEREALS	***824.4***	***858.4***	***833.4***	***825.8***	***831.3***	***835.8***
Wheat	***265.6***	***288.8***	***273.5***	***279.2***	***288.3***	***291.1***
held by:						
- main exporters[1]	*80.0*	*84.5*	*71.2*	*63.1*	*61.3*	*59.6*
- others	*185.6*	*204.3*	*202.3*	*216.1*	*227.0*	*231.5*
Coarse grains	***385.1***	***392.7***	***373.5***	***360.2***	***353.7***	***353.8***
held by:						
- main exporters[1]	*118.7*	*128.8*	*129.0*	*124.0*	*103.2*	*106.4*
- others	*266.4*	*263.9*	*244.5*	*236.2*	*250.5*	*247.4*
Rice (milled basis)	***173.7***	***176.9***	***186.3***	***186.4***	***189.2***	***190.9***
held by:						
- main exporters[1]	*33.2*	*32.3*	*39.9*	*46.2*	*51.1*	*53.9*
- others	*140.5*	*144.6*	*146.4*	*140.2*	*138.1*	*137.0*
Developed countries	***196.2***	***197.5***	***188.7***	***176.6***	***159.3***	***164.6***
Australia	*9.5*	*7.3*	*6.9*	*5.7*	*7.0*	*10.4*
Canada	*12.5*	*11.1*	*9.4*	*9.5*	*9.4*	*6.9*
European Union[2]	*33.2*	*42.8*	*41.9*	*43.6*	*38.2*	*39.9*
Japan	*6.6*	*6.7*	*6.5*	*6.9*	*7.5*	*7.3*
Russian Federation	*21.0*	*23.7*	*15.3*	*13.5*	*17.4*	*14.5*
South Africa	*1.8*	*5.1*	*3.6*	*2.6*	*3.9*	*4.8*
Ukraine	*8.5*	*8.3*	*7.7*	*5.6*	*5.9*	*6.5*
United States of America	*95.8*	*88.8*	*91.3*	*80.7*	*58.4*	*60.3*
Developing countries	***628.1***	***660.9***	***644.6***	***649.2***	***672.0***	***671.3***
Asia	***533.8***	***546.4***	***533.1***	***542.8***	***567.5***	***569.2***
China (mainland)	*393.0*	*401.0*	*385.6*	*382.7*	*391.0*	*395.4*
India	*36.3*	*44.1*	*52.1*	*62.4*	*69.0*	*71.4*
Indonesia	*9.2*	*10.2*	*11.5*	*9.0*	*7.9*	*7.7*
Iran (Islamic Republic of)	*11.6*	*10.6*	*9.1*	*9.8*	*11.5*	*10.3*
Korea, Republic of	*4.5*	*4.1*	*2.6*	*2.6*	*3.0*	*3.4*
Pakistan	*6.0*	*5.4*	*3.5*	*2.0*	*4.2*	*6.0*
Philippines	*3.7*	*4.1*	*5.5*	*4.5*	*4.4*	*4.6*
Syrian Arab Republic	*1.5*	*2.1*	*2.2*	*3.2*	*4.1*	*1.7*
Turkey	*6.0*	*7.1*	*6.6*	*10.1*	*10.5*	*9.0*
Africa	***55.2***	***61.7***	***61.5***	***57.5***	***57.9***	***57.9***
Algeria	*5.6*	*5.3*	*6.6*	*6.7*	*6.3*	*5.1*
Egypt	*7.4*	*6.9*	*5.1*	*5.2*	*4.6*	*4.3*
Ethiopia	*4.8*	*5.5*	*6.2*	*7.2*	*7.4*	*6.5*
Morocco	*5.9*	*6.7*	*7.3*	*5.8*	*3.6*	*5.7*
Nigeria	*3.4*	*3.1*	*2.8*	*1.8*	*1.8*	*1.9*
Tunisia	*1.0*	*1.1*	*1.0*	*1.2*	*1.0*	*1.1*
Central America and the Caribbean	***9.7***	***10.3***	***10.1***	***10.1***	***9.3***	***8.2***
Mexico	*6.5*	*7.7*	*7.6*	*7.4*	*6.9*	*6.3*
South America	***28.8***	***41.9***	***39.3***	***38.2***	***36.8***	***35.5***
Argentina	*7.4*	*12.3*	*12.6*	*12.7*	*11.0*	*10.8*
Brazil	*12.7*	*20.2*	*16.9*	*15.9*	*16.7*	*16.7*

Source: FAO.

Notes: 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						
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	251	309
2021 - July	291	251	276	279	235	293
2021 - August	324	272	285	254	237	282
2021 - September	337	270	291	235	240	262
2021 - October	353	302	302	238	246	
2021 - November	378	330	314	249	252	
2021 - December	379	329	318	266	260	
2022 - January	378	327	304	275	271	
2022 - February	386	335	312	291	286	

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		***27 949.6***	***1 161.6***	***29 111.2***	***31 911.5***
East Africa		***10 879.9***	***813.0***	***11 692.9***	***12 277.7***
Burundi	Jan/Dec	*166.3*	*15.0*	*181.3*	*184.0*
Comoros	Jan/Dec	*63.3*	*0.0*	*63.3*	*67.6*
Eritrea	Jan/Dec	*458.5*	*0.0*	*458.5*	*459.0*
Ethiopia	Jan/Dec	*1 755.2*	*50.0*	*1 805.2*	*1 965.0*
Kenya	Oct/Sept	*3 583.0*	*80.0*	*3 663.0*	*3 679.0*
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*	*695.0*
Sudan	Nov/Oct	*1 865.0*	*330.0*	*2 195.0*	*2 366.0*
Uganda	Jan/Dec	*531.3*	*23.0*	*554.3*	*667.1*
United Republic of Tanzania	Jun/May	*910.0*	*10.0*	*920.0*	*965.0*
Southern Africa		***3 138.0***	***15.7***	***3 153.7***	***3 911.1***
Lesotho	Apr/Mar	*153.5*	*0.6*	*154.1*	*213.3*
Madagascar	Apr/Mar	*726.2*	*8.0*	*734.2*	*737.4*
Malawi	Apr/Mar	*141.2*	*3.0*	*144.2*	*214.5*
Mozambique	Apr/Mar	*1 550.9*	*1.0*	*1 551.9*	*1 805.1*
Zimbabwe	Apr/Mar	*566.2*	*3.1*	*569.3*	*940.8*
West Africa		***11 496.6***	***176.9***	***11 673.5***	***12 948.3***
Coastal Countries		***6 055.6***	***56.5***	***6 112.1***	***7 261.6***
Benin	Jan/Dec	*181.0*	*6.0*	*187.0*	*438.0*
Côte d'Ivoire	Jan/Dec	*1 974.5*	*5.5*	*1 980.0*	*2 579.1*
Ghana	Jan/Dec	*1 571.9*	*5.0*	*1 576.9*	*1 670.0*
Guinea	Jan/Dec	*1 020.0*	*5.5*	*1 025.5*	*1 300.5*
Liberia	Jan/Dec	*467.2*	*13.0*	*480.2*	*386.5*
Sierra Leone	Jan/Dec	*501.0*	*21.0*	*522.0*	*472.0*
Togo	Jan/Dec	*340.0*	*0.5*	*340.5*	*415.5*
Sahelian Countries		***5 441.0***	***120.4***	***5 561.4***	***5 686.7***
Burkina Faso	Nov/Oct	*722.6*	*9.0*	*731.6*	*755.0*
Chad	Nov/Oct	*163.0*	*41.6*	*204.6*	*199.6*
Gambia	Nov/Oct	*389.2*	*6.5*	*395.7*	*312.0*
Guinea-Bissau	Nov/Oct	*178.0*	*6.3*	*184.3*	*144.3*
Mali	Nov/Oct	*589.0*	*5.0*	*594.0*	*576.0*
Mauritania	Nov/Oct	*703.0*	*21.0*	*724.0*	*556.8*
Niger	Nov/Oct	*476.6*	*25.0*	*501.6*	*622.0*
Senegal	Nov/Oct	*2 219.6*	*6.0*	*2 225.6*	*2 521.0*
Central Africa		***2 435.1***	***156.0***	***2 591.1***	***2 774.4***
Cameroon	Jan/Dec	*1 323.9*	*10.0*	*1 333.9*	*1 481.0*
Congo	Jan/Dec	*337.0*	*2.0*	*339.0*	*315.0*
Central African Republic	Jan/Dec	*72.4*	*23.0*	*95.4*	*96.0*
Democratic Republic of the Congo	Jan/Dec	*680.0*	*120.0*	*800.0*	*860.0*
Sao Tome and Principe	Jan/Dec	*21.8*	*1.0*	*22.8*	*22.4*

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		***24 290.1***	***902.0***	***25 192.1***	***28 291.4***
Cis in Asia		***5 524.1***	***0.0***	***5 524.1***	***5 734.2***
Kyrgyzstan	Jul/Jun	*631.4*	*0.0*	*631.4*	*635.9*
Tajikistan	Jul/Jun	*1 184.3*	*0.0*	*1 184.3*	*1 144.0*
Uzbekistan	Jul/Jun	*3 708.4*	*0.0*	*3 708.4*	*3 954.3*
Far East		***9 607.0***	***92.0***	***9 699.0***	***12 125.2***
Bangladesh	Jul/Jun	*8 138.2*	*90.0*	*8 228.2*	*10 284.4*
Democratic People's Republic of Korea	Nov/Oct	_*	_*	_*	_*
Nepal	Jul/Jun	*1 468.8*	*2.0*	*1 470.8*	*1 840.8*
Near East		***9 159.0***	***810.0***	***9 969.0***	***10 432.0***
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	*4 505.0*	*425.0*	*4 930.0*	*5 230.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 605.4***	***25.1***	***1 630.5***	***1 632.1***
Haiti	Jul/Jun	*848.2*	*25.1*	*873.3*	*729.9*
Nicaragua	Jul/Jun	*757.2*	*0.0*	*757.2*	*902.2*
TOTAL		***53 845.1***	***2 088.7***	***55 933.8***	***61 835.0***

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

* Estimates not available.

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2021/2022

(thousand tonnes)

		2020/21			2021/22
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		***17 455.7***	***852.1***	***18 307.8***	***20 445.6***
East Africa		***7 988.0***	***722.0***	***8 710.0***	***10 633.0***
Kenya	Oct/Sept	***3 599.0***	***80.0***	***3 679.0***	***4 390.0***
Somalia	Aug/Jul	*795.0*	*210.0*	*1 005.0*	*1 050.0*
South Sudan	Nov/Oct	*603.0*	*92.0*	*695.0*	*712.0*
Sudan	Nov/Oct	*2 036.0*	*330.0*	*2 366.0*	*3 586.0*
United Republic of Tanzania	Jun/May	*955.0*	*10.0*	*965.0*	*895.0*
Southern Africa		***3 893.9***	***17.2***	***3 911.1***	***3 097.7***
Lesotho	Apr/Mar	*212.7*	*0.6*	*213.3*	*174.1*
Madagascar	Apr/Mar	*729.4*	*8.0*	*737.4*	*916.0*
Malawi	Apr/Mar	*213.0*	*1.5*	*214.5*	*179.5*
Mozambique	Apr/Mar	*1 804.1*	*1.0*	*1 805.1*	*1 611.0*
Zimbabwe	Apr/Mar	*934.7*	*6.1*	*940.8*	*217.1*
West Africa		***5 573.8***	***112.9***	***5 686.7***	***6 714.9***
Burkina Faso	Nov/Oct	*746.0*	*9.0*	*755.0*	*875.0*
Chad	Nov/Oct	*158.0*	*41.6*	*199.6*	*249.6*
Gambia	Nov/Oct	*309.0*	*3.0*	*312.0*	*357.0*
Guinea-Bissau	Nov/Oct	*138.0*	*6.3*	*144.3*	*159.3*
Mali	Nov/Oct	*571.0*	*5.0*	*576.0*	*916.0*
Mauritania	Nov/Oct	*535.8*	*21.0*	*556.8*	*767.0*
Niger	Nov/Oct	*597.0*	*25.0*	*622.0*	*740.0*
Senegal	Nov/Oct	*2 519.0*	*2.0*	*2 521.0*	*2 651.0*
ASIA		***22 703.3***	***358.1***	***23 061.4***	***25 087.4***
CIS in Asia		***5 723.1***	***11.1***	***5 734.2***	***5 660.6***
Kyrgyzstan	Jul/Jun	*624.8*	*11.1*	*635.9*	*839.6*
Tajikistan	Jul/Jun	*1 144.0*	*0.0*	*1 144.0*	*1 179.0*
Uzbekistan	Jul/Jun	*3 954.3*	*0.0*	*3 954.3*	*3 642.0*
Far East		***12 123.2***	***2.0***	***12 125.2***	***13 270.8***
Bangladesh	Jul/Jun	*10 284.4*	*0.0*	*10 284.4*	*11 170.0*
Nepal	Jul/Jun	*1 838.8*	*2.0*	*1 840.8*	*2 100.8*
Near East		***4 857.0***	***345.0***	***5 202.0***	***6 156.0***
Afghanistan	Jul/Jun	*2 632.0*	*100.0*	*2 732.0*	*3 374.0*
Syrian Arab Republic	Jul/Jun	*2 225.0*	*245.0*	*2 470.0*	*2 782.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 622.0***	***10.1***	***1 632.1***	***1 615.1***
Haiti	Jul/Jun	*719.8*	*10.1*	*729.9*	*780.1*
Nicaragua	Jul/Jun	*902.2*	*0.0*	*902.2*	*835.0*
TOTAL		***41 781.0***	***1 220.3***	***43 001.3***	***47 148.1***

Source: FAO.

Notes: Countries included in this table are only those that have entered the new marketing year. The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2019); for full details see http://www.fao.org/countryprofiles/lifdc

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