



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. Critical areas of concern are Afghanistan and the Tigray Region in Ethiopia, where conflict situations have severely worsened the already fragile food insecurity conditions, and in Haiti and southern Madagascar due to natural disasters and weather shocks. At the global level, the impact of the COVID-19 pandemic continues to undermine food security.

Asia	0.8
Africa	2.9
Central America and the Caribbean	-0.4
South America	-3.6
North America	-1.6
Europe	4.7
Oceania	-9.3
World	0.7

World cereal production 2021 over 2020

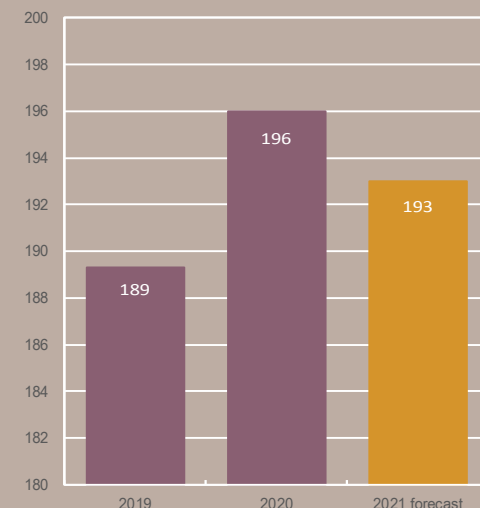
(yearly percentage change)

+0.7%

LIFDC cereal production 2021 over 2020

-1.5%

(million tonnes)



REGIONAL HIGHLIGHTS

AFRICA Floods in West Africa and East Africa caused crop damage and losses in localized areas resulting in small production downturns in 2021, but the aggregate outputs are still forecast to remain above average. Unabated conflicts in both subregions continue to drive up food insecurity. Harvesting of the main season crops was completed in North Africa and Southern Africa earlier in the year and outputs are estimated at above-average levels.

ASIA Drought conditions in Near East countries dragged down cereal production to below-average levels, while the poor socio-economic situations in several countries exacerbated the impacts on agriculture and food security, particularly in Afghanistan and the Syrian Arab Republic. In Far East, wheat production reached a record high in 2021, while the paddy output was estimated at a bumper level reflecting beneficial weather conditions. In CIS Asia, rainfall shortages curbed yields and the overall cereal output is forecast to be below average in 2021.

LATIN AMERICA AND THE CARIBBEAN

The impact of two concurrent natural disasters in Haiti inflicted agricultural damage and significantly worsened the food insecurity situation in the country. In South America, prolonged dryness in some major producing countries reduced crop yields, but larger plantings mostly offset the effects of reduced crop productivity, helping to maintain above-average harvests in 2021.

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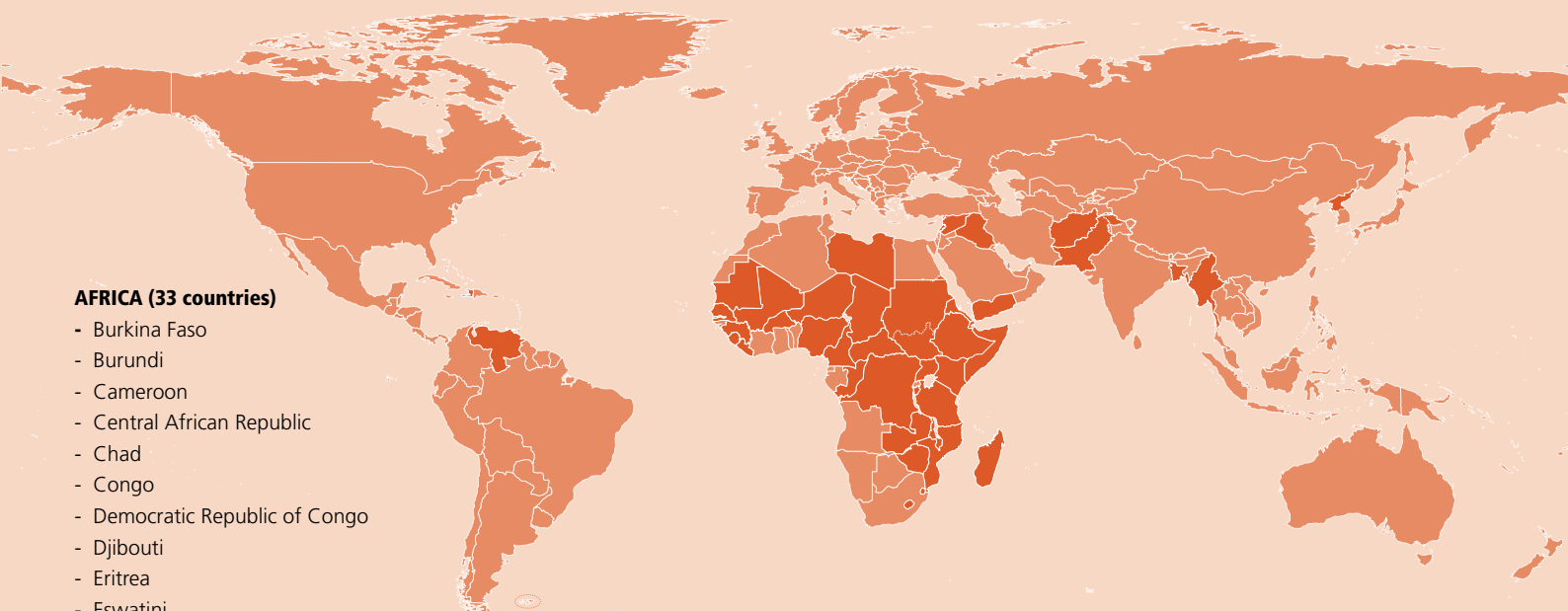
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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



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)

** See Terminology ([page 6](#))

Source: GIEWS, 2021. *Crop Prospects and Food Situation #3* [online]. [Cited 23 September 2021], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

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

AFRICA (33 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, population displacements

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

Kenya

Poor seasonal rains

- About 2.1 million people are estimated to be severely food insecure between August and October 2021, reflecting the poor performance of the March–May 2021 “long-rains” that affected crop and livestock production, mainly in northern and eastern pastoral, agro-pastoral and marginal agricultural areas.

Somalia

Poor seasonal rains, civil insecurity

- About 2.2 million people are estimated to be severely food insecure, IPC Phase 3

(Crisis) and IPC Phase 4 (Emergency)

between July and September 2021, mainly as a result of unfavourable April–June “Gu” rains, which severely affected crop and livestock production, and due to heightened conflict since early 2021.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes

- About 1.04 million people are estimated to be severely food insecure between June and September 2021, mainly due to livelihood losses caused by the rising level of Lake Tanganyika and the overflow of the Rusizi River which displaced about 40 000 people in Bujumbura Rural, Bujumbura Mairie, Rumonge and Makamba provinces.

Chad

Civil insecurity

- According to the latest “Cadre Harmonisé (CH)” analysis, about 1.8 million people were estimated to be in CH Phase 3 (Crisis) and above between June and August 2021 due to persisting insecurity in Lac and Tibesti regions that continues to disrupt livelihood activities and to cause population displacements.

- About 400 000 people were displaced due to insecurity in the Lake Chad Region. In addition, 520 000 refugees mostly from the Central African Republic, Nigeria and the Sudan reside in the country due to conflicts.

Democratic Republic of the Congo

Persisting civil insecurity

- According to the March 2021 IPC analysis, 26.2 million people were projected to be severely food insecure between August and December 2021. This is due to the impact of the COVID-19 pandemic on the local economy and the ongoing conflict in eastern provinces, which triggered population displacements. The "State of Siege" declared on 6 May 2021 in the eastern provinces of North Kivu and Ituri is still in place.

Djibouti

Floods

- 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 socioeconomic impact of the COVID-19 pandemic on the livelihoods of vulnerable households.

Eritrea

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

Ethiopia

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

- About 7.4 million people are estimated to be severely food insecure between July and September 2021 in western and central cereal deficit areas in Tigray, Amhara, Oromia and SNNP regions. Particular concern exists for the Tigray Region where, as a result of the impact on livelihoods of the conflict which started in November 2020, about 400 000 people are estimated to face IPC Phase 5 (Catastrophe) levels of food insecurity.

Niger

Civil conflict

- According to the latest CH analysis, about 2.28 million people were assessed to need humanitarian assistance between June and August 2021 due to the increase in security incidents, which have resulted in widespread disruption of agricultural and marketing activities,

diminishing livelihood opportunities for households.

- An estimated 283 000 people have been displaced in Diffa, Tahoua and Tillabery regions due to the civil conflicts. In addition, the country hosts 250 000 refugees, mainly from Nigeria and Mali.

Nigeria

Persisting conflict in northern areas

- According to the latest CH analysis, about 12.82 million people were assessed to be in need of humanitarian assistance between June and August 2021 because of the worsening conflict that is driving new population displacements, particularly in northern states. Over 2.9 million people are estimated to be internally displaced in northern states due to the civil insecurity and natural disasters. The areas inaccessible to humanitarian interventions are facing the worst food insecurity conditions. Recent flooding caused by torrential rains has further curtailed the delivery of assistance in the affected areas.

South Sudan

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

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, driven by insufficient food supplies, an economic downturn, high food prices and the lingering impact of widespread floods in 2020. About 7.2 million people (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 and economic downturn

- 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 prices and reduced incomes owing to the effects of the economic downturn. However,

this number is lower than the figure in the same period in 2021 due of the large upturn in agricultural production that boosted household food supplies.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the latest CH analysis, about 2.87 million people were estimated to be food insecure and in need of humanitarian assistance between June and August 2021. In Centre-Nord and Sahel regions, insecurity continues to cause population displacements, further deteriorating the food security situation.
- About 1.42 million people have been displaced and about 22 500 refugees, mostly from Mali, are residing in Sahel Region.

Cameroon

Civil insecurity, population displacements

- According to the March 2021 CH analysis, about 1.9 million people were projected to be severely food insecure, CH Phase 3 (Crisis) or above between June and August 2021. This is mainly the result of conflict, socio-political unrest and COVID-19-related economic shocks.
- About 42 percent of the severely food insecure people are in the Northwest and Southwest regions, and, as of August 2021, over 1 million people were internally displaced in the country.

Congo

Refugee influx

- There are about 21 000 refugees from the Central African Republic and 28 600 refugees from the Democratic Republic of the Congo residing in the country. Host communities face food shortages and limited livelihood opportunities, and refugees' food security is essentially dependent on continued humanitarian assistance.

Eswatini

Economic downturn and reduced incomes

- An estimated 209 000 people are food insecure between April and September 2021, down from 347 000 between January and March, reflecting the positive effects of the above-average harvest in 2021. However, households continue to face food access constraints,

largely underpinned by the impacts of the COVID-19 pandemic on the economy.

Guinea

Reduced incomes associated to the COVID-19 pandemic

- About 683 000 people were estimated to be in need of food assistance between June and August 2021, primarily due to food access constraints on account of the effects of the pandemic. In addition, about 6 000 refugees, mostly from Côte d'Ivoire and Sierra Leone, are residing in the country.

Lesotho

Economic downturn and reduced incomes

- The number people projected to be food insecure between the January and March 2022 lean season is put at 312 000, nearly half the figure estimated in 2021. The improved outlook rests mostly on the upturn in domestic cereal production in 2021 that bolstered households' cereal supplies. However, a slow economic recovery in 2021 continues to impose constraints on households' incomes, impinging on their economic capacity to access food.

Liberia

High food prices and 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 8 200 refugees that require assistance.

Libya

Civil insecurity, economic and political instability, high food prices

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

Madagascar

Drought in southern areas and limited income-earning opportunities

- An estimated 1.14 million people are food insecure in southern and southeastern regions and require urgent

humanitarian assistance. This figure is projected to increase to 1.3 million between October 2021 and March 2022.

- The effects of a severe drought on agricultural production in 2021 and the impact of the COVID-19 pandemic, particularly the loss of incomes due to the economic slowdown, are the key drivers of food insecurity

Malawi

Economic downturn and reduced incomes

- An estimated 1.1 million people are food insecure, with projections indicating that this figure will increase to 1.5 million between October 2021 and March 2022. The number of food insecure people is, however, well below the estimate between January and March 2021 when 2.6 million people were assessed to be in need of humanitarian assistance. The current improved situation is driven by the large 2021 cereal harvest that helped to partly mitigate the adverse effects of the COVID-19 pandemic.

Mali

Civil insecurity

- According to the latest CH analysis, about 1.31 million people were estimated to be in CH Phase 3 (Crisis) and above between June and August 2021 as a result of the escalation of the conflict that continued to cause population displacements, combined with the impacts of the COVID-19 pandemic and weather shocks.
- About 288 000 people have been displaced in central and northern parts of the country. In addition, the country hosts approximately 47 000 refugees.

Mauritania

Localized production shortfalls and reduced incomes

- According to the latest CH analysis, about 457 000 people were assessed to be in need of humanitarian assistance between June and August 2021 as a result of localized shortfalls in cereal and livestock production, and reduced incomes owing to the negative effects of the COVID-19 pandemic on the economy.
- About 72 600 refugees, mostly from Mali require humanitarian assistance.

Mozambique

Localized shortfalls in staple food production, insecurity in northern areas

- An estimated 1.7 million people require humanitarian assistance at least up until

the end of September 2021. Populations in Cabo Delgado are experiencing the severest levels of acute food insecurity, where an estimated 227 000 people are facing IPC Phase 4 (Emergency) levels of food insecurity, reflecting the impacts of the conflict on livelihoods and rainfall deficits that adversely affected cereal production in 2021.

Namibia

Economic downturn and reduced incomes

- Food security conditions have improved in 2021 compared to the previous year, however, the negative effects of the COVID-19 pandemic, primarily income and job losses, continue to constrain households' access to food.

Senegal

Localized shortfalls in cereal production and reduced incomes

- According to the latest CH analysis, about 490 000 people were estimated to be in need of humanitarian assistance between June and August 2021, down from the estimated 766 000 people for the same period in 2020. The current level of food insecurity are driven by localized production shortfalls due to the effects of adverse weather events (floods) on cereal production and reduced incomes of most vulnerable households on account of the impact of the COVID-19 pandemic.
- An estimated 14 500 refugees, mostly from Mauritania, require humanitarian assistance.

Sierra Leone

High food prices

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

Sudan

Conflict, civil insecurity, soaring food prices

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

Uganda

Weather extremes

- In Karamoja Region, about 188 000 people (16 percent of the population) are estimated to be severely food

insecure between August 2021 and January 2022, mainly as a result of consecutive rainy seasons characterized by erratic rains which adversely affected crop and livestock production.

- In the country, about 932 000 refugees from South Sudan and about 436 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

United Republic of Tanzania

Localized shortfalls in staple food production

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

Zambia

Reduced incomes and localised shortfalls in cereal production

- An estimated 1.58 million people are projected to need humanitarian assistance between October 2021 and February 2022, down from the 2 million people assessed to be food insecure in the corresponding period in 2020/21. The large agricultural output in 2021 is the main driver of the improved situation, however, the effects of the COVID-19 pandemic that are constraining households' economic access to food and localized shortfalls in crop production, have limited a larger improvement this year.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict, economic crisis

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

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity and economic downturn

- A large portion of the population suffers from low levels of food consumption and very poor dietary diversity.
- The economic constraints, particularly resulting from the global impact of the COVID-19 pandemic, have increased the population's vulnerability to food insecurity.
- The harvest of the 2021 main season is expected to reach households in October/November leading to transitory improvements in food security.

Lebanon

Financial and 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 multi-dimensional 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) or above, was projected to increase by nearly 3 million to 16.2 million people 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

- Between March and May 2021, about 10.9 million people were estimated in IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency), representing one-third of the population analysed. The IPC analysis, conducted before the withdrawal of foreign troops from the country in August 2021, estimated that between June and November 2021, the number of people in IPC Phase 3 (Crisis)

or above would decrease to 9.5 million. The situation is likely to deteriorate.

Bangladesh

Economic constraints and refugee influx

- Food insecurity and poverty levels have increased due to income losses caused by the effects of the COVID-19 pandemic.
- According to the latest figures from UNHCR (July 2021), about 870 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in Cox's Bazar District.

Iraq

Civil conflict, low oil prices, economic slowdown

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

Myanmar

Conflict, political instability and economic constraints

- The political crisis, following the military takeover on 1 February 2021, caused increased tensions and unrest throughout the country resulting in new waves of population displacement. According to the latest figures from UNHCR (July 2021) following the military takeover, an additional 200 000 people were displaced, adding to the already existing 370 000 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 has affected the food security situation of vulnerable households.

Pakistan

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

- The country hosts close to 1.4 million registered and approximately 0.6 million unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and are straining the already

limited resources of the host communities. Following the Taliban's takeover of Afghanistan, this number may increase considerably, adding additional pressure on the already difficult food security conditions of the host community.

- Poverty levels have increased due to losses of income-generating opportunities due to the effects of the COVID-19 pandemic on the economy.
- Prices of wheat flour, the country's main staple, were at high levels in most markets in August 2021, constraining access to food.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela (Bolivarian Republic of)

Severe economic crisis

- The total number of refugees and migrants from the country is estimated at 5.6 million, with the largest populations located in Colombia (1.7 million), Peru (1 million) and Chile (457 000). Humanitarian needs for refugees and migrants are significant. Food insecurity situations of migrants reportedly worsened due to losses of income-generating opportunities in the host countries amid the COVID-19 pandemic. The expected slow recovery of the host countries' economies is likely to only marginally restore the livelihoods of migrants.

- According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela (R4V), the number of Venezuelan refugees and migrants (including in-transit and temporary) in need of food assistance is estimated at 3.26 million in 2021.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Reduced agricultural production, socio-political turmoil, exacerbated by natural disasters

- About 4.4 million people were estimated to be facing severe acute food insecurity and were in need of urgent food assistance between March and June 2021. The high levels of food insecurity are the result of reduced cereal outputs in 2018–2020 and elevated food prices, exacerbated by income losses amid the COVID-19 pandemic and socio-political turmoil. The natural disasters (a 7.2 magnitude earthquake and a tropical storm) that struck the south region in August, destroyed productive assets and infrastructure, and caused losses of stored food, further deteriorating livelihoods of affected households. In these areas, the number of people in acute food insecurity is estimated at 980 000 between September 2021 and February 2022, up from 932 000.

Terminology

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

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

* Unfavourable Production Prospects

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

[page 12 \(Africa\)](#)

[page 22 \(Asia\)](#)

[page 29 \(Latin America and the Caribbean\)](#)

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GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview

World cereal production and stocks revised downward, but overall supplies in 2021/22 remain adequate

Persistent drought conditions in several major producing countries have resulted in a 29.3 million tonne cut to FAO's 2021 cereal **production** forecast since the previous report in July, now pegged at 2 788 million tonnes. Notwithstanding this reduction, global cereal production is still projected to grow by 0.7 percent (18.7 million tonnes) relative to the outturn in 2020.¹

Among the major cereals, the forecast for world wheat production in 2021 has undergone the largest

downward revision and is lowered by 15.2 million tonnes since July to 769.5 million tonnes, 0.7 percent (5.7 million tonnes) below the previous year's outturn. The reduction predominantly reflects the negative impact of prolonged drought conditions on yield prospects in the United States of America, Canada and, to a lesser extent, Kazakhstan, as well as adverse weather in the Russian Federation that increased winter crop losses and lowered yields compared to earlier expectations. These reductions more than offset upward revisions made to production forecasts in Brazil, the European Union and Ukraine, underpinned by continued beneficial weather. At 1 499 million tonnes, FAO's forecast for global coarse grains production in 2021 has been lowered by 13.7 million tonnes but, in contrast to wheat, remains above the previous year's level by

Table 1. World cereal production
(million tonnes)

	2019	2020 estimate	2021 forecast	Change: 2021 over 2020 (%)
Asia	1 196.6	1 225.3	1 234.6	0.8
Far East	1 089.8	1 111.4	1 135.2	2.1
Near East	73.6	78.4	67.9	-13.4
CIS in Asia	33.2	35.5	31.5	-11.4
Africa	193.6	200.1	205.9	2.9
North Africa	36.0	32.6	37.3	14.3
West Africa	65.7	66.5	65.6	-1.3
Central Africa	7.1	6.9	7.0	0.8
East Africa	56.3	57.5	56.7	-1.3
Southern Africa	28.6	36.5	39.3	7.7
Central America and the Caribbean	42.5	42.6	42.4	-0.4
South America	228.4	232.7	224.4	-3.6
North America	479.4	496.8	488.6	-1.6
Europe	542.2	521.6	546.4	4.7
European Union ¹	324.1	282.2	296.2	5.0
CIS in Europe	202.7	204.3	210.2	2.9
Oceania	27.9	50.2	45.5	-9.3
World	2 710.7	2 769.2	2 787.9	0.7
Developing countries	1 652.3	1 691.9	1 698.8	0.4
Developed countries	1 058.4	1 077.3	1 089.1	1.1
- wheat	760.8	775.1	769.5	-0.7
- coarse grains	1 446.9	1 479.9	1 499.3	1.3
- rice (milled)	502.9	514.3	519.1	0.9

Note: Includes rice in milled form. 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](#).

1.3 percent (19.5 million tonnes). Approximately half of this month's downgrade relates to expected maize production in Brazil and the United States of America, where persistent rainfall shortages have curtailed yield prospects; the output in Brazil is now forecast to decline year on year, however, production in the United States of America is still expected to increase on a yearly basis. Maize production forecasts have been raised for Argentina, the European Union and Ukraine, albeit by smaller amounts than the aforementioned cuts, as continued conducive weather has bolstered yield prospects, while recent field assessments also point to a larger-than-previously estimated maize acreage in Argentina. The forecast for global barley production in 2021 has also been trimmed by 6 million tonnes on lower yield expectations in the United States of America and Canada. FAO's forecast of global rice production in 2021 has undergone a 400 000 tonne downward revision since July to 519 million tonnes (milled basis), which is still 0.9 percent (4.8 million tonnes) above the 2020 level and an all-time high. The revision primarily stems from indications of more pronounced area reductions than previously foreseen in Japan and the United States of America in response to reduced producer margins, as well as in the Islamic Republic of Iran due to shortages of water for irrigation. These downgrades offset an upward revision for Viet Nam, where record-breaking yield results were reported.

World cereal **utilization** in 2021/22 is forecast at 2 809 million tonnes, down 1.7 million tonnes since July but still up 1.4 percent (40.1 million tonnes) from the 2020/21 level and marking a new record high. The forecast for total wheat utilization has been lowered by 2.2 million tonnes to 777 million tonnes, but is still 2.4 percent (18.5 million tonnes) higher than in 2020/21. Although feed use of wheat has been scaled down this month as supplies tightened and rising wheat prices reduced its competitiveness relative to maize, the expected increase in feed use in 2021/22 remains the main driver of the forecast year-on-year growth in total wheat utilization. The forecast for total utilization of coarse grains in 2021/22 is pegged at a record 1 511 million tonnes, nearly unchanged from the July forecast and up 0.9 percent (13.9 million tonnes) from the 2020/21 estimated level. The growth stems largely from higher projected utilization of maize in 2021/22, especially for feed and industrial

uses, and a slight increase in sorghum utilization, while utilization of barley is forecast to decline in 2021/22 on lower feed and industrial uses mostly due to reduced production. World rice utilization in 2021/22 is pegged at 520.5 million tonnes, up 1.5 percent (7.7 million tonnes) from 2020/21 and only little changed from July expectations. Downscaled rice food use prospects for various countries, namely Japan, the Islamic Republic of Iran and Viet Nam, were largely compensated by upgrades to industrial and feed use forecasts, chiefly for Viet Nam.

The forecast for world cereal **stocks** by the close of the 2022 seasons has been lowered by 27 million tonnes since July to 809 million tonnes, and now points to a likely slight decline of 0.9 percent (7 million tonnes) below opening levels. The resulting world stocks-to-use ratio for cereals in 2021/22 stands at 28.1 percent, down from the 2020/21 level of 29 percent, but still indicating a relatively comfortable supply level from an historical perspective. Following a 12.8 million tonne reduction this month, world wheat stocks are forecast to fall below their opening levels by 2 percent (5.8 million tonnes), to 284 million tonnes. The downward revision and year-on-year drawdown are mostly concentrated in major exporting countries, triggered by reduced production prospects in Canada, the United States of America, the Russian Federation and Kazakhstan. With these revisions, wheat ending stocks in the United States of America are set to reach their lowest levels in eight years, while in Canada they are forecast to fall to their lowest levels in over 40 years. The forecast for world coarse grains stocks has also been lowered this month by 14.3 million tonnes to 339 million tonnes, down 0.6 percent (2 million tonnes) from their opening levels. Making up the bulk of the downward revision, global maize stocks have been lowered by 10.1 million tonnes, primarily in the United States of America and Brazil reflecting reduced production prospects, and in Ukraine on larger anticipated exports. As for rice, upward revisions to stock forecasts for traditional rice importing countries, in particular, the Philippines and Japan, compensated for cuts to carryover forecasts for exporters, such as Thailand. As a result, the size of global rice stocks at the close of 2021/22 seasons still point to its second highest level on record, in the order of 185.1 million tonnes.

FAO's forecast for world **trade** in cereals in 2021/22 stands at 466 million tonnes, down 6.2 million tonnes from the July forecast and now 1.3 percent (6.2 million tonnes) below the 2020/21 record level, with expected contractions in wheat and coarse grains trade outweighing a foreseen expansion in global rice trade. At 185 million tonnes, the forecast for world wheat trade in 2021/22 (July/June) has been cut by 4.3 million tonnes since July, and now points to a decline of 1.4 percent (2.7 million tonnes) from the record level in 2020/21. Smaller wheat purchases are forecast by China (mainland), Morocco and Pakistan in 2021/22, compared with their imports in 2020/21 owing to higher production and stocks. On the export side, reduced production prospects are seen lowering wheat shipments in 2021/22 from the United States America, the Russian Federation and especially Canada, where exports

are forecast to potentially fall to a 19-year low. This month's forecast for world trade in coarse grains stands at 232.3 million tonnes, down 2.3 million tonnes from July. The reduction is led by a cut in global maize trade in view of reduced import demand from the European Union, due to a higher production forecast, and smaller-than-earlier-projected maize exports from Brazil and the United States of America as a result of tighter supplies. More subdued import expectations for countries located in the Asian Near East, Europe and Central America and the Caribbean have resulted in a 600 000 tonne downgrade of FAO's July forecast of global trade in rice in 2021 (January–December) to 47.6 million tonnes. At this level, global rice flows would surpass their 2020 levels by 4.4 percent, with all of the anticipated import growth stemming from the Far East and West Africa.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2019/20	2020/21 estimate	2021/22 forecast	Change: 2021/22 over 2020/21 (%)
Production¹	2 710.7	2 769.2	2 787.9	0.7
Developing countries	1 652.3	1 691.9	1 698.8	0.4
Developed countries	1 058.4	1 077.3	1 089.1	1.1
Trade²	440.0	472.1	465.8	-1.3
Developing countries	165.5	164.2	164.6	0.3
Developed countries	274.5	307.9	301.2	-2.2
Utilization	2 712.5	2 768.6	2 808.8	1.4
Developing countries	1 848.8	1 908.9	1 945.4	1.9
Developed countries	863.7	859.8	863.4	0.4
Per caput cereal food use (kg per year)	149.3	150.1	150.6	0.3
Stocks³	822.1	815.6	808.6	-0.9
Developing countries	646.0	662.5	656.4	-0.9
Developed countries	176.1	153.1	152.2	-0.6
World stock-to-use ratio (%)	29.7	29.0	28.1	-3.2

Note: Totals and percentage change computed from unrounded data.

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

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

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

Table 3. Basic facts of Low-Income Food-Deficit Countries (LIFDCs) cereal situation

(million tonnes, rice in milled basis)

	2019/20	2020/21 estimate	2021/22 forecast	Change: 2021/22 over 2020/21 (%)
Cereal production¹	189.3	195.6	192.6	-1.5
Utilization	239.8	246.5	251.2	1.9
Food use	180.9	185.4	190.2	2.6
Per caput cereal food use (kg per year)	156.7	157.0	157.4	0.3
Feed	24.7	25.8	25.8	-0.1
End of season stocks²	52.9	54.1	49.7	-8.1

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

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

Table 4. Cereal production of LIFDCs

(million tonnes)

	5-year average	2020 estimate	2021 forecast	Change: 2021 over 2020 (%)
Africa (36 countries)	110.6	117.9	118.1	0.1
East Africa	55.1	59.3	58.0	-2.3
Southern Africa	10.4	11.2	13.3	18.6
West Africa	38.1	40.6	39.9	-1.6
Central Africa	7.0	6.9	6.9	0.8
Asia (9 countries)	72.1	76.7	73.5	-4.1
CIS in Asia	10.4	10.3	9.7	-5.9
Far East	52.8	55.2	56.6	2.5
Near East	8.8	11.1	7.2	-35.3
Central America and the Caribbean (2 countries)	1.1	1.0	1.0	1.9
LIFDCs (47 countries)	183.7	195.6	192.6	-1.5

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

Drought conditions curb production in Asia, but the aggregate cereal output in Low-Income Food-Deficit Countries still forecast above average in 2021

FAO's latest forecast for aggregate cereal production of the Low-Income Food-Deficit Countries (LIFDCs)² stands at an above-average level of 192.6 million tonnes in 2021, about 3 million tonnes below the previous year's outturn.

The forecast year-on-year decline in aggregate cereal production is driven by a low output in *Asia*. The largest production declines in the region are estimated in **Afghanistan** and **the Syrian Arab Republic** where rainfall shortages curbed yields and dragged down cereal harvests to below-average levels. The difficult socio-economic situation in both countries also continues to undermine agricultural productive capacities. Poor rains also affected crops in **Uzbekistan**, with the harvest estimated to be below average. In the remaining countries of the *Asia* region, cereal outputs are forecast at near-average to above-average levels.

In *Africa*, the aggregate cereal output is forecast at an above-average level in 2021 and is virtually unchanged on a yearly basis. Harvesting of the 2021 main season cereal crops in *East African* and *West African* countries is ongoing and is expected to conclude at the end of the calendar year. In both subregions, aggregate cereal production is forecast to be above average in 2021, but down from the previous year. The expected year-on-year production decline reflects the effects of heavy rains and floods that caused crop damage, while an erratic temporal distribution of seasonal rains has lowered yield prospects in several countries. Persistent insecurity and conflicts in several countries in both subregions also continued to disrupt agricultural livelihoods and curbed production in the affected areas. In *Southern Africa*, a significant production increase

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

was estimated in 2021, with the aggregate output reaching a well above-average level. The increase is underpinned by large outturns in **Zimbabwe** and **Malawi** that more than offset the small production declines in **Madagascar** and **Mozambique**, where crops were affected by adverse weather conditions and conflicts. Cereal production in *Central Africa* is forecast to remain virtually unchanged on a yearly basis in 2021 and similar to the five-year average, as persisting conflicts continue to impede agricultural activities.

In *Central America and the Caribbean*, the earthquake and tropical cyclone Grace that affected **Haiti** in August 2021 caused disruptions to agricultural activities and lowered production prospects for most staple foods, significantly worsening local food security conditions. In **Nicaragua**, production is forecast to have increased marginally year on year to an above-average level, reflecting generally beneficial weather conditions.

Small increase in import requirements in 2021/22, underpinned by higher needs in Asian countries

The aggregate cereal import requirement for LIFDCs in the 2021/22 marketing year is estimated at 59.8 million tonnes, 6 percent above the five-year average and up 2 percent on a yearly basis. The moderate increase in aggregate import needs is principally driven by large import forecasts in *Asian* countries, specifically **Afghanistan** and **the Syrian Arab Republic**, due to shortfalls in domestic production which needs to be compensated with external supplies.

In *West Africa*, import requirements are also expected to increase, underpinned by expected localized production declines due to the impacts of the floods and conflicts. By contrast, in *Southern Africa*, import needs are significantly lower than the preceding year and are also below the five-year average, reflecting the bumper domestic harvests in 2021.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

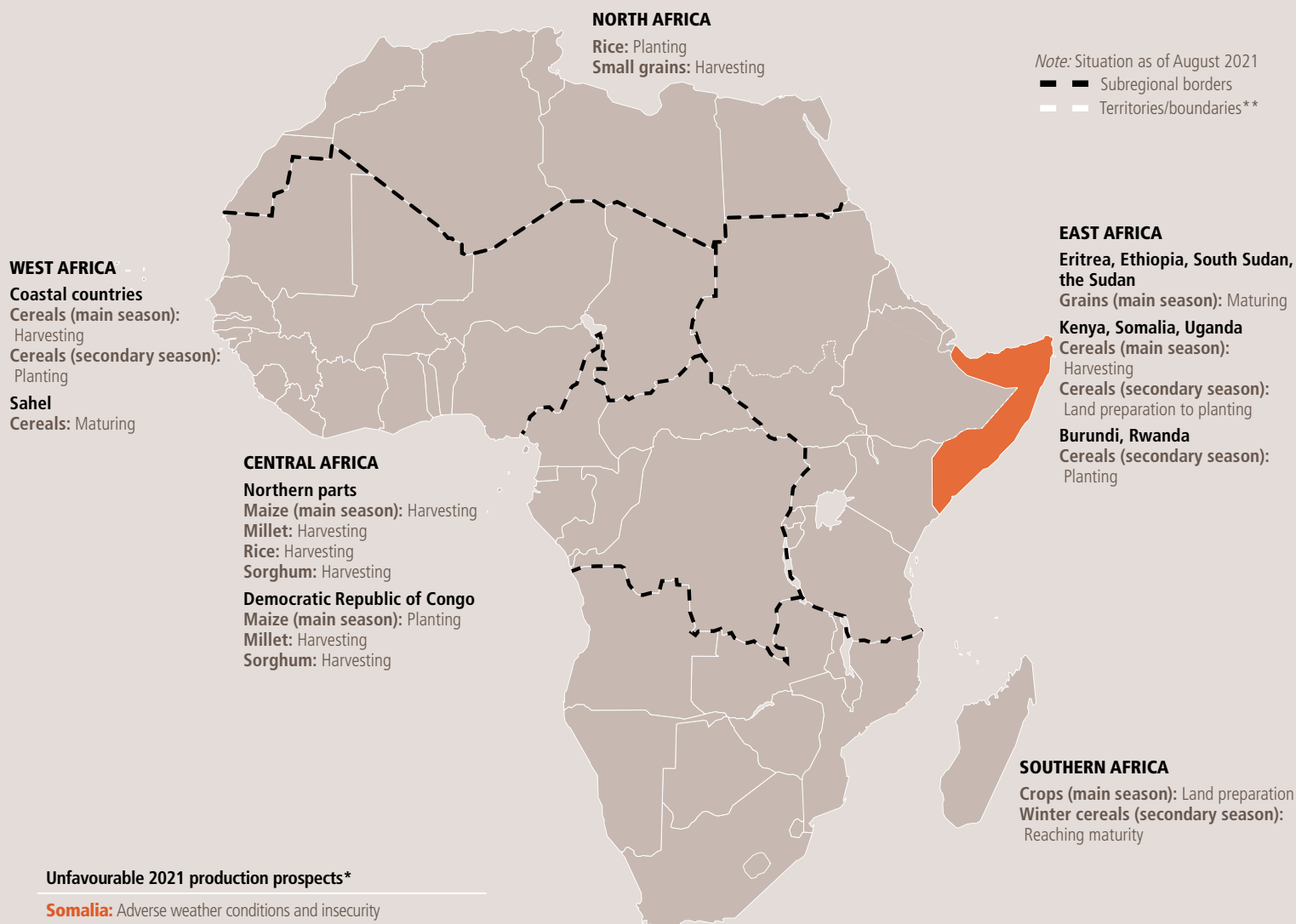
	2019/20 or 2020	2020/21 or 2021	2021/22 or 2022
	Actual imports	Import estimate	Import requirement ¹
Africa (36 countries)	28 566	30 715	30 853
East Africa	11 961	12 347	12 252
Southern Africa	3 154	3 768	2 908
West Africa	10 860	11 796	12 894
Central Africa	2 591	2 804	2 800
Asia (9 countries)	24 331	26 359	27 368
CIS in Asia	5 524	5 718	5 449
Far East	9 338	11 009	11 126
Near East	9 469	9 632	10 794
Central America and the Caribbean (2 countries)	1 626	1 492	1 560
LIFDC (47 countries)	54 522	58 566	59 782

Note: Totals computed from unrounded data.

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

REGIONAL REVIEWS

AFRICA



*/** See Terminology (page 6).

Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

Source: GIEWS, 2021. *Crop Prospects and Food Situation #3* [online]. [Cited 23 September 2021], modified to comply with the United Nations map No. 4045 Rev. 8.1, 2018.

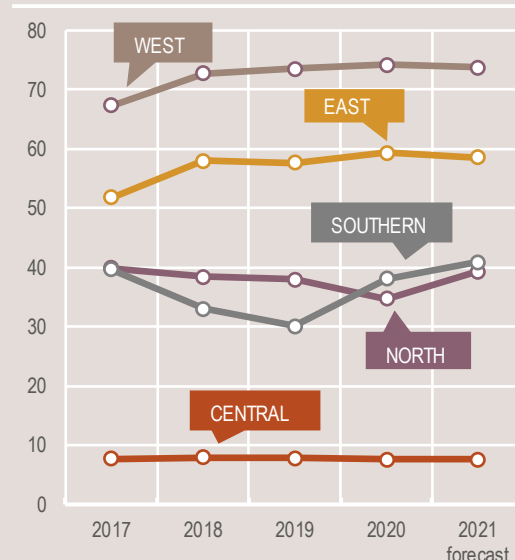
Africa Production Overview

Aggregate cereal production in Africa is forecast at 220 million tonnes in 2021, 7 percent above the five-year average and marginally above the outturn in 2020. The expected production growth in 2021 principally reflects large cereal outputs in Southern Africa and North Africa, where overall conducive seasonal weather conditions pushed up cereal acreages and yields.

In East Africa and West Africa, the 2021 main season cereal crops are being harvested and aggregate production in each subregion is forecast to remain above average. However, heavy rains that caused floods and consequently crop damage, as well as the impact of persistent conflicts, have resulted in modest year on year production declines in each subregion.

The cereal outturn in Central Africa is forecast to remain nearly unchanged on a yearly basis, amid the continuation of conflicts that undermine agricultural activities and curb productive capacities.

Cereal production (million tonnes)



NORTH AFRICA



Above-average cereal production in 2021

The 2021 wheat and barley harvests were completed in June in **Egypt, Libya** and **Morocco**, while in Algeria harvesting activities were concluded by mid-August. Maize and rice crops in **Egypt**, grown as summer crops, will be harvested from early October.

In **Morocco**, cereal production in 2021 recovered from the drought-stricken harvest in the previous year, reflecting abundant rainfall after January 2021 that replenished soil moisture deficits accumulated in late 2020. The cereal output in 2021 is estimated at almost 10 million tonnes, more than 50 percent above the average and almost three times higher on a yearly basis. While planting in **Algeria** and **Tunisia** took place under favourable weather conditions, most cropped areas in Algeria suffered from drought conditions in January and February 2021. Subsequent adequate rainfall contributed to some recovery in

northeastern parts of the country, while drought conditions and unseasonably high temperatures prevailed elsewhere. The 2021 cereal production is estimated at a below-average level of 3.5 million tonnes and down 38 percent on a yearly basis. In Tunisia, the 2021 cereal production was estimated at 1.8 million tonnes, about 10 percent above the average reflecting mostly conducive weather conditions. In **Egypt**, production forecasts point to an average output of 23.8 million tonnes.

In total, the subregional 2021 aggregate cereal production is forecast at 39.3 million tonnes, about 6 percent above the average and 13 percent above the previous year's level. The aggregate wheat harvest is estimated at 20 million tonnes, about 10 percent higher year on year and approximately 20 percent above the average.

All countries in the subregion rely heavily on wheat imports to cover their domestic consumption needs. Reflecting an above-average 2021 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, in the 2021/22 marketing year (July/June), is estimated at 51.8 million tonnes, about 2.4 percent above the five-year average. Part of the wheat and rice imports are also going to be used to boost domestic stocks.

Food inflation rates remained at modest levels in the first half of 2021

Despite the strengthening of international food prices, year-on-year food inflation rates during the first half of 2021 remained at low levels, buffered by subsidies on many basic commodities that have prevented price transmission. In **Morocco**, in July 2021, the annual food inflation rate increased from negative values since December 2020 to 2.2 percent. In the last decade, annual food price inflation in Morocco never exceeded 3 percent. In **Egypt**, where food price inflation is more volatile due to a large share of unsubsidized products, such as vegetables, in the food basket, the rate increased from 3.3 percent in June 2021 to 4.9 percent in July 2021. In **Tunisia**, despite decreasing from 8 percent in July 2021 to 7.4 percent in August 2021, the annual food inflation rate remained the highest in the subregion. In **Algeria**, food prices increased by 3.8 percent year on year in June 2021, down from 6.8 percent in May 2021. In **Libya**, updated information on the food price inflation has not been available since December 2020, when it was estimated at 3.2 percent, up from 1.5 percent one month earlier. The 2021 Libya Humanitarian Needs Overview estimated the total number of people in need of humanitarian assistance at 1.3 million (23 percent of the population, up from 0.9 million one year earlier), out of which 700 000 people also require food assistance, double the 2020 estimate.

Table 6. North Africa cereal production

(million tonnes)

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

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

WEST AFRICA



Overall favourable cereal production prospects in 2021

Overall, 2021 cereal production prospects are favourable, reflecting generally conducive weather conditions. At the national level, average to slightly above-average cereal outputs are forecast in the majority of countries, however, several countries were adversely affected by dry spells and flooding that caused localized crop damage and losses.

In coastal countries along the Gulf of Guinea, planting activities and the development of the 2021 main season crops were supported by adequate rainfall since the beginning of the season in March. Short dry spells in parts of **Guinea** and **Sierra Leone**, southern **Ghana** and **Côte d'Ivoire** and northern **Nigeria** were largely mitigated by improved precipitations in the June–August period. Harvesting of the main maize crops finalized in August in southern parts of **Nigeria**, **Togo**, **Benin**, **Ghana** and **Côte d'Ivoire**, and it is about to be completed in the northern areas of these countries as well as in eastern **Liberia** and southern **Chad**. Harvesting of other main crops, mainly sorghum, millet and rice, which reached full maturity with favourable vegetation conditions, is underway, while planting of the 2021 second season maize crops is taking place in southern parts.

In the Sahelian countries, following some rainfall deficits in June, weather conditions have been generally favourable since July and average to above-average cumulative rainfall have boosted crop yield prospects. Harvesting of coarse grains and rice crops is underway in southern parts of **Mali** and **Burkina Faso**, and it will start in October in southwestern **Mauritania**, southern **Niger** and the Lac Region in **Chad**. In the westernmost parts of the subregion, cereal crop conditions are also favourable and harvesting activities are about to start in southern **Senegal**, **the Gambia**, **Guinea-Bissau**, **Guinea** and **Sierra Leone**.

Although the abundant rainfall has been beneficial to crops in most parts of the subregion and mitigated the effects of rainfall deficits earlier in the season, torrential precipitation resulted in localized flooding in June and August in **the Gambia**, southern **Benin**, **Togo**, **Ghana**, south and northeastern **Chad**, parts of **the Niger** and northeast **Nigeria**. These floods caused disruptions to livelihoods and damage to standing crops. As above-average rains are forecast for the September–October period, there is high risk of additional floods in **Guinea**, **Senegal**, **Sierra Leone**, northern parts of **Liberia** and **Benin**. Persistent insecurity and civil conflict in the Lac and Tibesti regions in Chad, northeast Nigeria and in the Liptako-Gourma Region in central and western Mali, northern Burkina Faso and southern Niger, continue to severely affect agricultural activities and constrain farmers' access to agricultural inputs, curbing overall production expectations in the affected areas.

Despite foreseen localized production shortfalls due to the aforementioned

shocks (floods and conflicts), the aggregate cereal production in 2021 is forecast at about 74 million tonnes, slightly above the previous five-year average.

Prices of coarse grains increased, pressured by civil insecurity and torrential rains

Prices of domestically produced coarse grains strengthened in most Sahelian and coastal countries in the three months to August 2021 as the lean season progressed and prices were generally higher than the previous year. The elevated price levels mainly resulted from the seasonally below-average market availabilities, while continued disruptions of trade and markets activities due to protracted insecurity in the Chad Lake Basin and the Liptako-Gourma Region in the central Sahel, also contributed to high year-on-year levels. Furthermore, the sustained currency depreciations in countries outside the West Africa franc area have exerted additional inflationary pressure on food prices throughout 2020 and during the first half of 2021.

In **the Niger**, prices of millet, sorghum and maize increased steadily throughout 2021 in most markets continuing a noticeable upward trend since early 2020 and, in August, were on average over 20 percent above their year-earlier values. Since July, seasonal increases have been exacerbated by low import availabilities due to the suspension of exports from Burkina Faso and reduced traded quantities from Benin. Persistent insecurity conditions continue to disrupt markets, adding pressure to prices. In **Mali**, prices of millet and sorghum generally increased in the south, while they remained stable but at high levels in central and northern parts of the country,

Table 7. West Africa cereal production

(million tonnes)

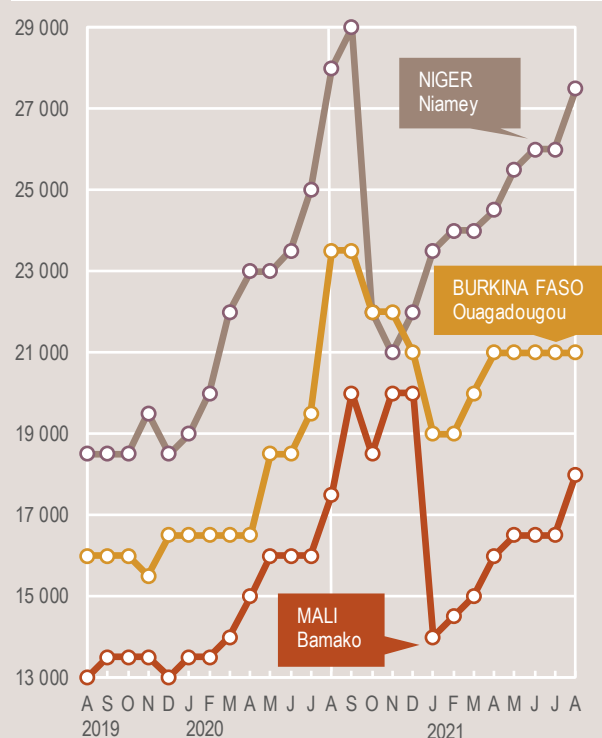
	Coarse grains			Rice (paddy)			Total cereals ¹			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
West Africa	50.4	53.3	51.8	20.6	20.8	21.8	71.1	74.2	73.7	-0.7
Burkina Faso	4.4	4.7	4.6	0.4	0.5	0.5	4.8	5.2	5.1	-2.5
Chad	2.6	2.6	2.6	0.3	0.3	0.3	2.9	2.9	2.9	-0.9
Ghana	2.9	3.7	3.6	0.8	1.0	1.0	3.7	4.6	4.6	-0.9
Mali	6.8	7.3	7.3	3.0	3.0	3.1	9.8	10.4	10.4	0.5
Niger	5.7	5.6	5.6	0.1	0.1	0.1	5.8	5.7	5.7	1.3
Nigeria	20.4	21.0	20.4	8.1	8.2	8.8	28.6	29.2	29.2	0.1

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

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

reflecting seasonally low market supplies and conflict-disrupted markets. In most parts of **Burkina Faso**, prices of millet were generally stable or declined slightly since May and were lower year on year reflecting adequate market supplies, while prices of sorghum continued to strengthen. Prices of grains were significantly higher in northeastern parts of the country due to the volatile security conditions. In **Senegal**, prices of millet and sorghum were overall stable since April 2021, reflecting a favourable supply situation. In **Chad**, prices of coarse grains have been stable in most markets during recent months and as of July were near or below their levels of a year before reflecting adequate market availabilities. However, significant price increases in June and July were recorded in southern and northern parts that were affected by floods, while prices in conflict-affected areas of the Lac Chad and Tibesti regions were the highest in the country.

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



Source : Afrique Verte.

In coastal countries, **Benin, Ghana** and **Togo**, coarse grain prices continued to increase in the June–August period, although at a lesser extent due to the commercialization of the recently harvested early planted crops. As of August, prices were well above their year-earlier values, reflecting tight supplies and strong export demand. In July and August, heavy rains disrupted marketing activities in some areas of the three countries, further supporting prices. In **Nigeria**, prices of coarse grains strengthened steadily since early 2021 and in July reached record and near-record levels, about 50 percent higher year on year. The combined effects of the COVID-19 containment measures and the difficult macro-economic conditions, including a sharp depreciation of the national currency, high transportation costs and the implementation of import restrictions, exacerbated recent seasonal gains. Prices were also pressured

by expectations of a below-average coarse grain output in northeastern and northcentral parts in 2021 due to protracted insecurity conditions that curbed plantings and hampered agricultural activities.

Food emergency driven by conflicts and economic downturns

Despite the three consecutive years of above-average cereal harvests, as well as favourable expectations for the 2021 cereal output, the food security situation in the subregion has deteriorated throughout 2021, particularly during the June–August period. This is mostly due to the combined effects of protracted conflicts, displacement of large numbers of

people and the negative economic impact of the COVID-19 pandemic on access to food. Recent waves of violent incidents and displacements have been recorded in the Lake Chad Basin and the Liptako-Gourma Region. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), as of August 2021, about 5.3 million people were internally displaced in **Burkina Faso, Chad, Mali, the Niger** and **Nigeria**, significantly above the 4.6 million people estimated in the previous year. Furthermore, the restrictions to contain the spread of the COVID-19 pandemic have had a negative impact on the subregional economy, curtailing income-generating activities of the most vulnerable households and exacerbating the inflationary pressure that has driven food prices to record and near-record highs in several countries. According to the latest “Cadre Harmonisé (CH)” analysis, the number of people who faced severe food insecurity, CH Phase 3 (Crisis) and above, in the subregion was estimated at 27.1 million between June and August 2021, the highest level in the last ten years and well above the 16.9 million estimated in the previous year. The highest prevalence of food insecurity was reported in **Nigeria**, where about 12.8 million people need urgent food assistance, followed by **Burkina Faso** (2.8 million), **the Niger** (2.3 million), **Chad** and **Sierra Leone** (1.8 million in each country) and **Mali** (1.3 million).

The flooding events that have occurred across the subregion since June are likely to have further curtailed access to food and worsened the food insecurity situation. These natural hazards, the impacts of which were not factored in the latest CH analysis, have disrupted farming and marketing activities, caused localized crop losses and hampered the delivery of humanitarian assistance, particularly in the areas already affected by insecurity conditions, eroding households’ ability to access food.

CENTRAL AFRICA



Conflicts, displacements and COVID-19 prevention measures continue to hamper agricultural activities

In the uni-modal rainfall northern areas of **Cameroon** and the **Central African Republic**, harvesting of the 2021 millet and sorghum crops is about to begin at the end of September. In central and southern areas of the two countries, harvesting of the 2021 main maize crop started in mid-August and is currently ongoing. In the northern provinces of the **Democratic Republic of the Congo**, harvesting of the 2021 main maize crop is expected to begin in October, while planting of the 2021 main season maize crops, to be harvested from November, is ongoing in the central provinces of the Democratic Republic of the Congo, the **Republic of the Congo** and **Gabon**. Weather conditions have been generally favourable across the subregion during the season, which are likely to result in good yields in areas not affected by civil insecurity. However, the ongoing conflicts and displacements, coupled with the measures implemented to control the COVID-19 pandemic, continue to affect agricultural activities and limit farmers' access to crop growing areas and agricultural inputs, and these factors will have a negative impact on 2021 crop production.

Prices of imported staple foods remain high in the third quarter of 2021

In **Cameroon**, prices of locally produced staple foods such as maize, beans and potatoes, increased seasonally between March and July 2021, before declining in August following the start of the harvests in central and southern areas. In the Far North Region, where the sorghum and maize harvest will begin at the end of September, prices have increased significantly between July and August 2021, as seasonal trends were amplified by strong export demand. In the **Central African Republic**, prices of most locally produced products, such as maize, rice, sorghum, palm oil and peanuts, increased slightly between March and August 2021, reaching higher year-on-year levels. In both countries, prices of imported commodities, such as rice, white beans, wheat and fish, remained above the previous five-year average levels in the June–August 2021 period. The impact of constraints related to COVID-19 on the global supply chain and higher prices in the international market, have exerted upward pressure on prices in 2021, while also curtailing import flows.

Over 30 million people severely food insecure in the third quarter of 2021

In the third quarter of 2021, the number of severely food insecure people in the **Democratic Republic of the Congo**, **Cameroon** and the **Central African Republic** is estimated at 30.4 million, about 25 percent of the total population. The main causes of the high levels of food insecurity are ongoing conflicts and displacements, which continue to disrupt

agricultural and marketing activities, severely affecting food availability and access especially in the eastern areas of the Democratic Republic of the Congo, Northwest and Southwest regions of Cameroon and most provinces of the Central African Republic. In addition, the socio-economic impacts of the COVID-19 pandemic resulted in significant income losses that substantially reduced households' purchasing power.

In the **Democratic Republic of the Congo**, according to the March 2021 Integrated Food Security Phase Classification (IPC) analysis, about 26.2 million people (27 percent of the total population) are projected to be severely food insecure between August and December 2021. Increasing violence in the eastern provinces of North Kivu and Ituri since early 2021 caused new displacements and led to the declaration of a "State of Siege" on 6 May 2021. According to the latest IPC projection, about 2.3 million people (nearly half of the total population) were estimated to be in IPC Phase 3 (Crisis) and above in the **Central African Republic** during the April to August 2021 lean season, due to continued civil insecurity. It is estimated that about 1.4 million people (almost one-third of the country's population) are either internally displaced or hosted in neighbouring countries as refugees. In **Cameroon**, according to the March 2021 CH analysis, about 1.9 million people (7 percent of the total population) were projected to be severely food insecure, CH Phase 3 (Crisis) or above between June and August 2021. About 42 percent of them are located in the Northwest and Southwest regions.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Central Africa	6.1	6.0	6.0	1.6	1.5	1.6	7.7	7.5	7.6	1.1
Cameroon	3.7	3.6	3.6	0.3	0.3	0.3	4.0	3.9	3.9	0.8
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	1.3
Democratic Republic of the Congo	2.2	2.2	2.2	1.2	1.2	1.3	3.5	3.4	3.5	1.4

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

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

EAST AFRICA



Poor rains affected 2021 first season harvests in central and southern areas

In central and southern parts of the subregion, namely **Burundi, Rwanda, southeastern Kenya, central and southern Somalia, the United Republic of Tanzania and Uganda** (excluding the Karamoja Region), harvesting of the 2021 first season cereal crops was recently completed. The March to May rainy season had a poor performance in several areas, causing a reduction in yields and consequently below-average harvests. In southern and central **Somalia**, an erratic temporal distribution of the “Gu” rains, including a late start and mid-season heavy rains, curtailed plantings, lowered yields and caused crop losses. Agricultural activities were also disrupted by the escalation of conflict since early 2021. As a result, cereal production is estimated to be 30 percent below the five-year average. Maize outputs in southeastern and coastal marginal agricultural areas of **Kenya**, are officially estimated to be 42 and 70 percent, respectively, below average, as the “long-rains” were particularly poor. In bi-modal rainfall areas of **Uganda**, cereal production is also estimated at

below-average levels as the March to June rains were characterized by an erratic distribution and below-average amounts, affecting yields especially in northern and eastern regions. By contrast, in **the United Republic of Tanzania**, the major “Msimu” harvest, completed in June in central and southern uni-modal rainfall areas, and the “Masika” harvest, which concluded in August in northern and northeastern bi-modal rainfall areas, are estimated at above-average levels due to a generally favourable performance of seasonal rains. In **Rwanda and Burundi**, abundant rains benefited the “2021B season” crops and the harvests are estimated at above-average levels.

In northern parts of the subregion, including central and western **Kenya**, the northeastern Karamoja Region in **Uganda, Ethiopia, Eritrea, the Sudan and South Sudan**, the main season cereal crops, for harvest from October, are at vegetative or maturing stages and production prospects are mixed. In **the Sudan, South Sudan** above-average June to September seasonal rains have boosted yield prospects, but also caused widespread floods that resulted in localized losses of standing crops, as well as livestock. The areas most affected by the floods are El Gezira, South Darfur, West Darfur and Gedaref states in **the Sudan**, Jonglei and Unity states in **South Sudan** and Afar, Amhara, Oromia and Somali regions in **Ethiopia**. In **the Sudan and Ethiopia**, despite some reductions in the planted area, crop production prospects are generally favourable. In **the Sudan**, plantings were constrained by soaring prices of agricultural inputs and the removal of fuel subsidies, while in the conflict-affected Tigray Region of **Ethiopia**, out of 1.3 million hectares of

farmland, only 320 000 hectares were reported to be have been cultivated due to widespread insecurity. In northern and central uni-modal rainfall areas of **South Sudan**, improved rains in July and August resulted in favourable vegetation conditions after a prolonged dry spell in June required replanting in localized areas. The scale of seasonal flooding and its impact on crops in 2021 is lower compared to the severe floods of the previous year. However, in Jonglei State, which was most affected by the floods in 2020, several areas remained inundated in 2021 and planting could not take place. In southern bi-modal rainfall areas of the country, the first season cereal crops were affected by substantial rainfall deficits and production from this season is expected at low levels. Overall, national cereal production in 2021 is forecast to be near average, with the lingering impact of the prolonged conflict and severe macro-economic challenges continuing to impede growth in agricultural production. In **Eritrea**, the 2021 “Kiremti” rainy season has been characterized by a timely onset and by above-average rains in July. Despite below-average rainfall amounts received in August, vegetation conditions were generally favourable in early September. In the key growing areas of the Rift Valley and Western provinces of **Kenya**, which produce the bulk of the national output, an erratic temporal distribution of precipitation during the “long rains” season has lowered production prospects in these regions. As a result, total national maize production is officially forecast to be between 5 and 10 percent below the five-year average. Crop production is also expected at below-average levels in the agro-pastoral Karamoja Region of **Uganda**, where the harvest will be

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2020 estim.	2021 fcast	5-yr Avg.	2020 estim.	2021 fcast	5-yr Avg.	2020 estim.	2021 fcast	Change: 2021/2020 (%)
East Africa	6.1	7.1	6.8	46.3	48.7	48.0	56.5	61.2	60.2	-1.6
Ethiopia	5.0	5.8	5.8	22.8	24.2	24.1	27.9	30.1	30.0	-0.3
Kenya	0.3	0.3	0.3	4.0	4.4	4.1	4.4	4.9	4.4	-8.7
Sudan	0.7	0.9	0.7	6.9	7.1	6.9	7.6	8.1	7.6	-5.8
Uganda	0.0	0.0	0.0	3.3	3.4	3.3	3.5	3.6	3.5	-3.5
United Republic of Tanzania	0.1	0.1	0.1	7.3	7.4	7.6	10.7	12.0	12.1	0.9

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

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

concluded in October, a delay of about a month. Heavy precipitation in May caused flooding and was followed by prolonged dry spells during the remainder of the season, which curbed crop yields. In addition, as a large proportion of farmers did not have the financial capacity to buy seeds and replant crops after the floods, the planted area is estimated to be below average.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the October to December rains are expected to be below average and their onset may be delayed by up to two weeks over most of the subregion. This may have a negative impact on the 2021 second season crops, on planting and germination of the 2022 main “Msimu” crops in central and southern **United Republic of Tanzania** and on pastoral resources.

The preliminary forecast for subregional cereal output stands at about 60 million tonnes, about 7 percent above the average of the previous five years, but this level will depend on the rainfall performance in the next months.

In pastoral and agro-pastoral areas of northern and eastern **Kenya**, southeastern **Ethiopia**, and central and northern **Somalia**, seasonally dry conditions are expected to still prevail until the start of the rainy season in October. These areas have been affected by two consecutive poor rainy seasons since October 2020, which caused a deterioration of rangeland resources and resulted in livestock emaciation as well as a substantial decline in milk production. Heavy showers in May had a positive impact on pastures, livestock conditions and milk production in some areas, but improvements were marginal and short lived. Rangeland conditions entered the dry season, which began in June, at below-average levels and pasture resources are being depleted at faster-than-normal rates. These areas have also been affected by a severe locust upsurge since late 2019. Sustained control operations carried out by the local governments with the support of FAO, combined with severe dryness during the March to May 2021 rainy season, successfully eliminated locust infestations in **Kenya**, while a lower number of swarms compared to one year ago remained in **Ethiopia** and **Somalia**.

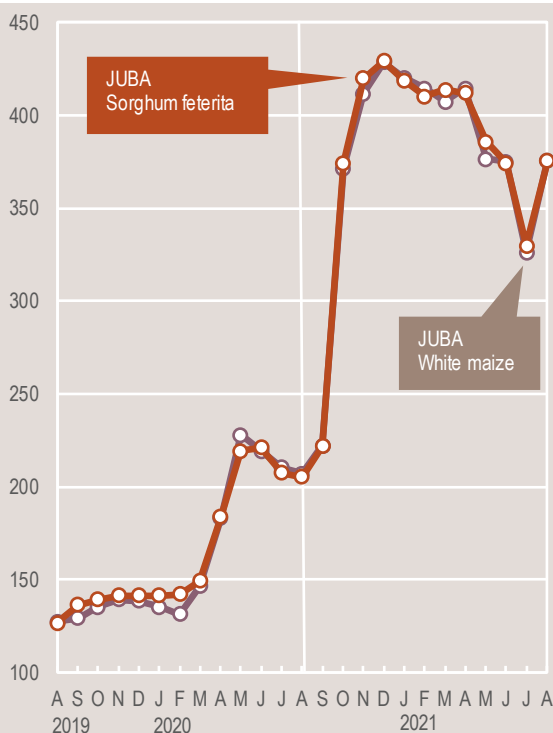
Breeding is currently underway in Afar Region in northeast **Ethiopia**, facilitated by the abundant “Karan/Karma” rains received in August, and control operations are being prevented by insecurity. New swarms are expected to start forming in early October, as the dry season begins in Afar Region, and they are likely to move to winter breeding areas in eastern **Ethiopia**, coastal **Eritrea** and northern **Somalia** during October.

High prices of coarse grains, especially in South Sudan and the Sudan

In **the Sudan**, prices of sorghum and millet continued the upward trend that started in late 2017 and increased by 20 to 40 percent between May and July 2021 as the Sudanese pound depreciated on the parallel market. In August, prices declined slightly or continued to increase but at slower rates than in previous months, as traders released some of their stocks in anticipation of the 2021 harvest. However, prices in August were at near-record to record levels, about two times higher than their already elevated year-earlier levels, mainly due to the continuous depreciation of the national currency

Retail prices of maize and sorghum in South Sudan

(South Sudanese Pound/kg)

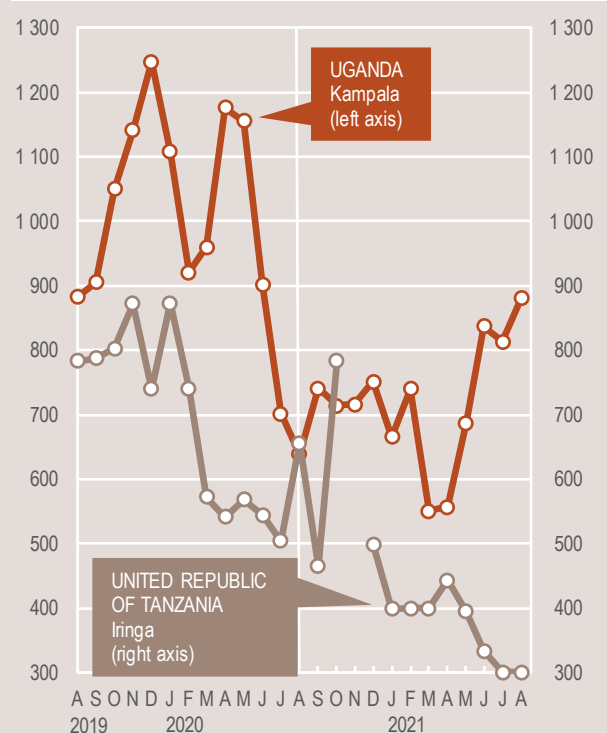


Source : Crop and Livestock Market Information System (CLIMIS).

Maize prices in selected East African markets

(Uganda Shilling/kg)

(Tanzanian Shilling/kg)



Source : Regional Agricultural Trade Intelligence Network.

and the soaring prices of agricultural inputs that inflated production costs. In **South Sudan**, prices of sorghum and maize declined in July in the capital, Juba, by 12 to 13 percent, but increased in August by 14 to 15 percent, reflecting fluctuations of the South Sudanese pound on the parallel market. August prices were exceptionally high, more than 80 percent above the already elevated year-earlier levels, due to the difficult macro-economic situation, inadequate domestic supplies and heightened insecurity. In **Uganda**, prices of maize remained firm in July, subsequently increasing unseasonally by 5 to 10 percent in August despite the recent completion of the first season harvest. Sustained exports exerted further upward pressure on prices, which were 40 to 65 percent higher on a yearly basis in August 2021 in spite of the recent reintroduction of COVID-19-related restrictions that substantially depressed domestic demand. Similarly, in **Somalia**, prices of maize and sorghum increased unseasonally in July by 10 to 25 percent despite the start of the main “Gu” harvest. Prices in July were up to 60 percent higher than a year earlier. In **Ethiopia**, prices of maize increased by 60 to 85 percent between January and July as seasonal patterns were compounded by the continuous depreciation of the country’s currency and by the poor performance of

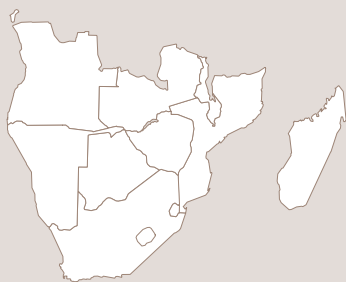
the secondary season “Belg” harvest. Prices in July were up to twice their year-earlier levels. In **the United Republic of Tanzania**, prices of maize declined by 30 to 45 percent between April and July as the “Msimu” and “Masika” harvests increased market supplies, but there was an uptick in price levels in major urban markets in August. Maize prices in August were, however, 25 to 55 percent below their year-earlier levels due to adequate domestic availabilities. In **Kenya**, prices of maize remained mostly stable in recent months and slightly below year-earlier values due to adequate domestic availabilities from the above-average 2020 cereal production and to sustained imports from Uganda and the United Republic of Tanzania.

Alarming food insecurity situation in several countries due to multiple shocks

More than 31 million people are estimated to be in need of humanitarian assistance, well above the high levels during the 2016 and 2017 droughts. In **Ethiopia**, about 7.4 million people are estimated to be severely food insecure between July and September 2021 in western and central cereal deficit areas in Tigray, Amhara, Oromia and SNNP regions. Particular concern exists for the Tigray Region where, as a result of the impact on livelihoods of

the conflict which started in November 2020, about 400 000 people are estimated to face IPC Phase 5 (Catastrophe) levels of food insecurity. In **South Sudan**, about 7.2 million people (about 60 percent of the total population) were estimated to have faced 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 is estimated to be severely food insecure, including about 108 000 people in IPC Phase 5 (Catastrophe). In **the Sudan**, 9.8 million people are estimated to be severely food insecure between June and September 2021. The high prevalence of food insecurity is mainly due to livelihood losses that were caused by floods in 2020, soaring food prices and inter-communal conflicts. In **Somalia**, about 2.2 million people are estimated to be severely food insecure between July and September 2021, mainly as a result of the cumulative impact of two consecutive poor rainy seasons on crops and rangeland resources. Similarly, in **Kenya**, about 2.1 million people are estimated to face severe food insecurity between August and October 2021, reflecting the poor performance the March–May “long-rains” and the economic impact from the COVID-19 pandemic.

SOUTHERN AFRICA



Rainfall forecasts indicate favourable conditions for 2022 cereal crops

Planting of the 2022 cereal crops is anticipated to begin in October 2021. Weather forecasts indicate a higher-than-normal probability of above-average rainfall across most of the subregion between October 2021 and March 2022, when the harvest period starts, supporting preliminary expectations that cereal production in 2022 would likely fall in the average to above-average range. The weather outlook in **Angola** differs, however, with forecasts pointing to an increased chance of below-normal rainfall, raising the possibility of a successive poor agricultural season following the drought-affected harvest in 2021. There are also two downside risks to agricultural production across the subregion. Firstly, there is the recent resurgence of COVID-19

cases and the reintroduction of some restrictive measures to stymie the spread of the virus. The measures, including limits on the movement of people within and across borders, could curtail households' income-earning opportunities, already adversely affected by the previous year's economic downturn, and impinge on their ability to physically and financially access inputs. However, governments are trying to avoid full lockdowns and this is expected to minimize the impacts on agricultural operations. Secondly, prices of fertilizers and other agro-chemicals are significantly higher year on year. This is expected to inflate production costs and could weigh on farmers' planting intentions, mostly affecting the commercial sector. If costs of fertilizers become prohibitively expensive, it may result in reduced utilization by both small and large-scale farmers and curtail crop yield potentials. The higher prices are also expected to increase the financial burden for governments that are implementing large-scale input subsidy programmes, such as in Malawi and Zimbabwe.

Subregional cereal output reaches record high in 2021

The aggregate cereal output for the subregion is estimated at 40.9 million tonnes in 2021, about 23 percent above the five-year average and a new record

high. The large outturn reflects good crop yields underpinned by conducive weather conditions and acreage increases driven by remunerative grain prices at planting time and continued government agricultural support programmes. Significant production increases compared to the five-year averages were estimated in **Botswana, Malawi, South Africa, Zambia** and **Zimbabwe**, where crops benefitted from almost ideal weather conditions throughout the season. Good outputs were also registered in **Eswatini, Lesotho** and **Namibia**. Although the cereal harvest in **Mozambique** was close to the average, poor rains and the effects of the ongoing conflict in northern provinces resulted in localized production shortfalls. Crops in **Angola** and **Madagascar**, particularly the southern regions of both countries, were affected by rainfall deficits that dragged down overall cereal harvests in 2021.

Upturn in domestic supplies reduce import needs

Reflecting the large harvests in 2021, the overall subregional cereal import requirement is estimated at a below-average level of 8.5 million tonnes in the 2021/22 marketing year (generally April/March). Wheat grain makes up the bulk of this quantity, followed by rice and then maize grain. Although most countries' import requirements declined, cereal import

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Southern Africa	2.1	2.5	2.4	27.0	30.7	33.8	4.2	4.9	4.7	33.3	38.1	40.9	7.2
excl. South Africa	0.3	0.4	0.4	13.1	14.0	15.9	4.2	4.9	4.7	17.6	19.2	21.0	9.3
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.7	4.2	4.0	3.9	4.5	4.2	-6.6
Malawi	0.0	0.0	0.0	3.3	3.9	4.3	0.1	0.1	0.1	3.4	4.0	4.4	9.7
Mozambique	0.0	0.0	0.0	2.4	2.5	2.4	0.4	0.5	0.5	2.8	3.0	2.8	-4.6
South Africa	1.8	2.1	2.0	13.9	16.8	17.8	0.0	0.0	0.0	15.7	18.9	19.9	5.1
Zambia	0.2	0.2	0.2	2.9	3.5	3.7	0.0	0.0	0.1	3.1	3.7	4.0	7.3
Zimbabwe	0.1	0.2	0.2	1.4	1.1	3.1	0.0	0.0	0.0	1.5	1.3	3.3	161.4

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

needs were estimated to have increased in Angola and Madagascar on account of the reduced domestic harvests.

Export volumes, principally maize grain, are forecast to increase and remain at an above-average level in the 2021/22 marketing year. Most grain exports will originate from South Africa, the leading producer and exporter in the subregion. Since the start of the marketing year in April 2021, **South Africa** has already exported 1.2 million tonnes of maize, a faster pace than the previous year and mostly yellow maize to Asian and European countries. Exports from **Zambia** are also forecast to increase and as cereal harvests increased in neighbouring countries, the export destinations are likely to be concentrated outside of Southern Africa, particularly the Democratic Republic of the Congo and East African countries. In the first two months of Zambia's current marketing year (May–June 2021), the maize export

quantity was already four times the level of the previous year during the same months.

Maize prices mostly stable,

In **South Africa**, monthly wholesale prices of maize grain were generally unchanged between June and August 2021 but remained higher year on year. The recent stable levels reflect the effects of downward pressure from the large 2021 harvest and the slight appreciation of the currency, which was offset by spillover effects from the international market where benchmark prices of maize grain were at high levels. In import dependent **Botswana** and **Namibia**, prices of maize meal were stable or fell slightly between May and July 2021 and were higher on a yearly basis reflecting price dynamics in South Africa, the countries' main source of grains. In **Malawi**, prices of maize grain declined sharply in the first half of the year and, in July 2021, were below year-earlier levels reflecting abundant supplies from the

recent well above-average harvest. However, the price at which most farmers were selling their maize grain between April and July was reportedly below the minimum farmgate price set by the government. Prices of maize grain were generally stable in **Zambia** and higher on a yearly basis, despite the upturn in production in 2021. A steep appreciation of the national currency in August could ease inflationary pressure on food prices in the next months. In **Zimbabwe**, the monthly food inflation rate has remained in single digits throughout 2021, in contrast to the previous year when it reached highs of nearly 40 percent. The slowdown in price increases reflects a more stable official exchange rate and the effects of the large 2021 cereal output.

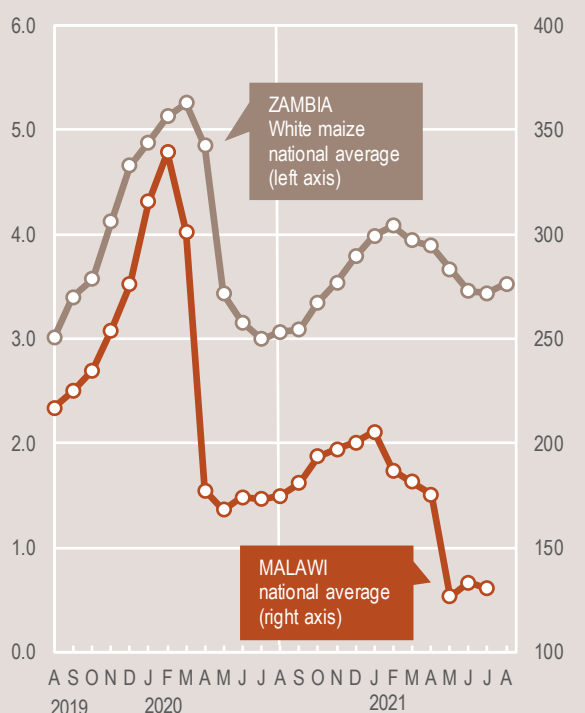
Number of food insecure falls across the subregion, despite critical situations in Angola, Madagascar and Mozambique

Overall, the prevalence of food insecurity during the peak lean period between January and March 2022 is foreseen to be below the level experienced in the first quarter of 2021, when an estimated 24 million people required humanitarian assistance. Although official estimates have not yet been released by all countries, the number of people expected to be in need of food assistance is projected at about 21 million in the first quarter of 2022. The foreseen improvement is largely related to the above-average cereal production that has bolstered households' food availability. However, the effects of the COVID-19 pandemic, including the recent resurgence of cases and reimplementations of restrictive measures, are contributing to constraining households' incomes and their economic capacity to purchase food, preventing a more substantial improvement in food security conditions.

Notwithstanding the overall reduction in the number of food insecure, there are areas of severe food insecurity where conditions are foreseen to worsen. In the southern regions of **Angola** and **Madagascar**, the effects of the weather-stricken harvests that adversely affected food availability and incomes have left many households exhausting their coping strategies and facing high levels of food insecurity. In Madagascar, the latest IPC analysis indicates that there are households experiencing IPC Phase 5 (Catastrophe), with extreme lack of food and other basic needs, even after utilizing available coping strategies, and require urgent assistance to save lives and avoid a collapse of livelihoods. In northern **Mozambique**, particularly the province of Cabo Delgado, the situation is also critical due to the persisting conflict that has disrupted livelihoods and agricultural activities. As of August, the conflict has caused the displacement of 732 000 people.

Maize prices in selected Southern African markets

(Zambia New Kwacha/kg) (Malawi Kwacha/kg)



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

REGIONAL REVIEWS

ASIA



*/** See Terminology (page 6).

Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

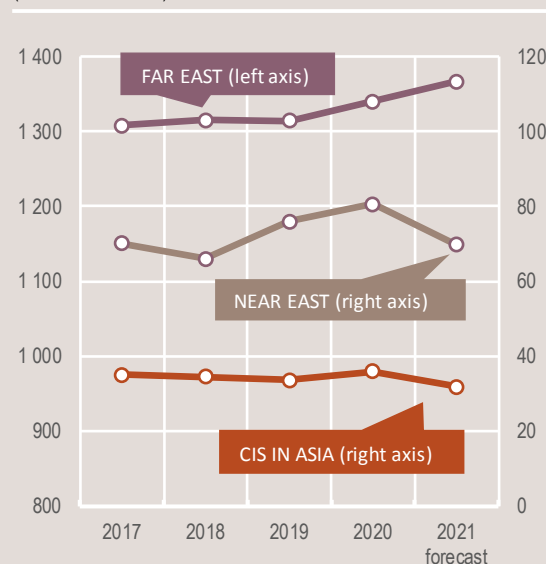
Source: GIEWS, 2021. *Crop Prospects and Food Situation #3* [online]. [Cited 23 September 2021], modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Asia Production Overview

Aggregate cereal production in Asia is forecast at an above-average level of 1 469 million tonnes in 2021, about 1 percent above the previous year's level. The year-on-year increase mostly reflects large outturns in the Far East, where the aggregate wheat output reached a record level in 2021. Similarly, paddy production in the Far East subregion is forecast at an above-average level on account of conducive monsoon rains that support good yield levels.

By contrast, widespread dryness across countries in CIS Asia and Near East subregions dragged down the aggregate wheat output to a below-average level in 2021. The poor socio-economic situations and persisting civil insecurity in several of the Near East countries also contributed to the low harvests in 2021.

Cereal production (million tonnes)



FAR EAST



Production prospects point to a bumper cereal output in 2021

In most Northern Hemisphere countries, the 2021 main crops, mostly rice and coarse grains, are approaching the harvest stage. The 2021 secondary crops will be planted towards the end of the year following the completion of the main harvest. In the countries along or south of the Equator, including **Indonesia, Sri Lanka, Timor-Leste** and **Viet Nam**, the 2021 main crop harvest finalized in the first part of the year and farmers are currently engaged in gathering the secondary crops.

The 2021 subregional aggregate cereal output is forecast at 1 367 million tonnes (rice in paddy equivalent), slightly above the previous five-year average. The good output reflects a bumper 2021 main season harvests and a positive outlook for the 2021 secondary crops. Overall, precipitation amounts during the monsoon season (June to September) have been average to above

average over the main cereal producing areas, benefitting the 2021 main season crops and replenishing soil moisture for planting activities for the forthcoming secondary season. Supplies of agricultural inputs, such as irrigation water, fertilizers and pesticides, were also reported to be adequate, boosting average yields in most countries.

Production of paddy, the major food staple in the subregion, is preliminary forecast at an above-average level of 693 million tonnes. The total area planted is forecast above the five-year average, but the production gains principally reflect anticipated yield increases. Above-average outputs are forecast in **Bangladesh, China (mainland), Cambodia, India, Indonesia, Pakistan Sri Lanka** and **Thailand**. In **Viet Nam**, the output is expected to remain close to the five-year average. By contrast, paddy production is forecast to decrease to below-average levels in **Japan**, reflecting a decline in the area planted in response to price declines, and in **Myanmar**. In **the Republic of Korea** and **Malaysia**, the 2021 paddy outputs are set to decrease only marginally compared with the previous five-year averages. The 2021 subregional production of coarse grains, mostly maize, is forecast at 396 million tonnes, 6 percent above the five-year average, mostly supported by area expansions in response to strong demand by the local feed industry. Bumper outputs are forecast in **Bangladesh, India,**

Indonesia, Thailand, the Philippines and **Pakistan**. In **China (mainland)**, the subregion's main producer of maize, the area planted is forecast to increase for the second consecutive year, mainly driven by strong domestic prices at planting time. By contrast, maize production is forecast to decrease in **Viet Nam** as farmers opted to cultivate alternative and more profitable crops, including vegetables.

The 2021 wheat harvest finalized last June and based on official data the subregion's output is estimated at a record high of 277.1 million tonnes, mostly reflecting bumper harvests in the important wheat producing countries, including **China (mainland), India** and **Pakistan**.

Aggregate cereal import requirements in 2020/21 forecast well above the five-year average

Aggregate cereal import requirements in 2021/22 are forecast at 170 million tonnes (rice in milled terms), slightly below last year's record level but 20 percent above the five-year average. The high level of imports reflects the strong demand for feed crops, particularly in **China (mainland)**, mostly driven by the recovery in domestic pork production following the African Swine Fever (ASF) outbreaks in 2018 and 2019 as well as the strong growth in poultry, dairy and starch sectors. Imports of coarse grains (including maize, barley and sorghum) by China (mainland) are forecast at about 42.6 million tonnes more than double the five-year average.

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 fcast	5-yr Avg.	2020 estim.	2021 fcast	5-yr Avg.	2020 estim.	2021 fcast	5-yr Avg.	2020 estim.	2021 fcast	Change: 2021/2020 (%)
Far East	263.9	272.2	277.1	375.6	383.4	396.5	674.4	684.5	693.2	1 313.9	1 340.1	1 366.9	2.0
Bangladesh	1.2	1.0	1.3	3.3	4.0	4.7	53.9	56.1	56.8	58.4	61.1	62.8	2.7
Cambodia	0.0	0.0	0.0	1.0	0.9	0.9	10.7	11.1	11.4	11.6	12.0	12.3	2.8
China (mainland)	133.4	134.2	137.1	269.4	269.9	282.7	211.5	211.9	214.0	614.2	616.0	633.7	2.9
India	100.4	107.9	108.1	45.6	49.2	48.9	174.2	184.5	184.6	320.2	341.6	341.6	0.0
Japan	0.9	0.9	0.9	0.2	0.2	0.2	10.7	10.5	10.2	11.8	11.6	11.4	-2.2
Myanmar	0.1	0.1	0.1	2.5	2.9	2.8	26.1	25.1	24.9	28.7	28.1	27.8	-1.1
Nepal	2.0	2.2	2.1	2.9	3.1	3.1	5.4	5.6	5.6	10.4	10.9	10.8	-0.7
Pakistan	25.4	25.2	27.0	7.3	8.1	8.1	11.2	12.6	12.7	43.9	46.0	47.8	3.9
Philippines	0.0	0.0	0.0	7.8	8.1	8.1	19.0	19.6	19.9	26.8	27.8	28.0	0.9
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.2	4.7	5.1	5.4	4.9	5.3	7.6
Sri Lanka	0.0	0.0	0.0	0.3	0.4	0.4	4.1	5.1	5.2	4.4	5.5	5.6	1.8
Thailand	0.0	0.0	0.0	5.0	5.4	5.4	31.2	30.3	31.4	36.2	35.7	36.8	2.9
Viet Nam	0.0	0.0	0.0	4.9	4.6	4.6	43.2	42.8	43.3	48.2	47.4	47.9	1.1

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

The subregional wheat import requirement in 2021/22 is estimated at an above-average level of 56.2 million tonnes, reflecting the strong demand by both food and feed industries. The largest increase in wheat imports is forecast in **China (mainland)**, where imports are expected to reach almost 9 million tonnes, almost 65 percent above the five-year average. Similarly, large wheat import requirements are forecast for **Pakistan**, as the government and traders aim to boost domestic availabilities after a series of below-average outputs between 2018 and 2020.

Imports of rice in the 2021 calendar year are forecast at 14.2 million tonnes for the subregion as a whole, 22 percent above the 2020 level. Aggregate rice exports in the 2021 calendar year are set to reach 39.5 million tonnes, up 6 percent from 2020.

Prices of rice generally declined in August, following mixed trends in previous months

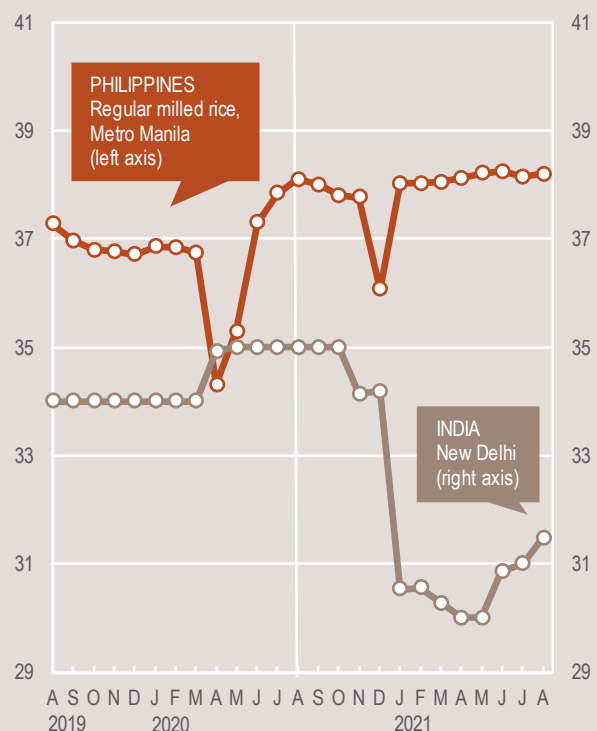
Domestic rice price movements varied across the subregion during June and August, but generally started to decline in August. In **Thailand**, rice prices decreased for a fifth consecutive month in August and were 15 percent below their year-earlier levels, largely attributed to weak import demand due to high shipping costs amid COVID-19-related logistical constraints. In **Viet Nam**, additional downward pressure on rice prices stemmed from improved market supplies from the 2021 “summer-autumn” crop, estimated at an above-average level and prices in August

were well below their year-earlier levels. In **India**, prices were generally stable between June and August reflecting the end of the 2021 secondary “Rabi” harvest and the government procurement programme. Rice prices remained generally stable in **China (mainland)** and **Cambodia**, owing to adequate market availabilities. In **Myanmar**, after softening in June and July, domestic rice prices increased by 5 percent in August, as seasonal rises were amplified by the expectations of a lower output from the main 2021 crop to be gathered soon. In the importing countries, prices softened slightly in **Bangladesh**, although remained at a high level. By contrast, prices have been decreasing seasonally since July in **Sri Lanka** with the start of the 2021 secondary harvest. Prices of wheat and wheat flour were generally stable in most countries, including the leading producers, **China (mainland)** and **India**, owing to adequate market availabilities. Similarly, in Pakistan, wheat flour prices remained generally stable, owing to improved market availabilities from the above-average 2021 harvest and large import quantities, but in August prices were

still higher year on year following the steep increases in 2020 owing to tight supplies. In wheat importing countries, including **Indonesia** and **Sri Lanka**, good market supplies from above-average import volumes kept prices stable since July. By contrast, wheat flour prices increased in most markets in **Bangladesh**, with seasonal tight availabilities compounded by a slowdown in imports.

Rice retail prices in selected Far East countries

(Philippine Peso/kg) (Indian Rupee/kg)



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

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

(thousand tonnes)

	5-yr Avg (2016/17 to 2020/21)	2020/21	2021/22	Change: 2021/22 over 2020/21 (%)	Change: 2021/22 over 5-yr avg (%)
Coarse grains					
Exports	3 989	5 611	4 680	-16.6	17.3
Imports	74 225	105 811	100 879	-4.7	35.9
Production	375 645	383 394	396 537	3.4	5.6
Rice (milled)					
Exports	38 748	39 468	40 239	2.0	3.8
Imports	13 813	14 154	11 602	-18.0	-16.0
Production	448 683	455 872	461 570	1.2	2.9
Wheat					
Exports	2 313	2 299	3 452	50.1	49.2
Imports	53 620	58 670	56 227	-4.2	4.9
Production	263 854	272 155	277 126	1.8	5.0

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

COVID-19 pandemic worsens food insecurity of a large number of people

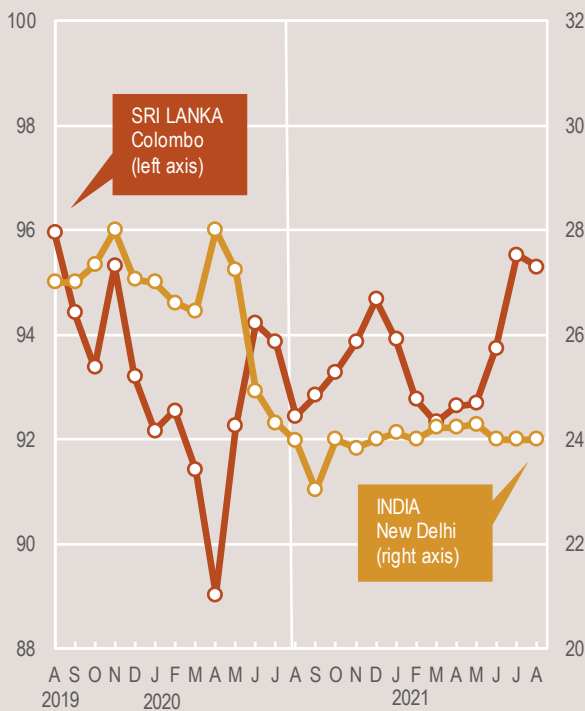
Food security conditions are generally good across the subregion, but the COVID-19 pandemic continues to have a negative impact on the livelihoods of a large number of people, especially through income losses, including remittances. Of particular concern is the heightened food insecurity situation of refugees and host communities in Bangladesh and Pakistan. In **Bangladesh**, the food security situation of about 860 000 Rohingya refugees and the host communities has severely deteriorated in 2021 compared to the pre-COVID-19 pandemic period. In northwestern parts of **Pakistan**, along the border with Afghanistan, about 1.4 million Afghan refugees were sheltering in the country, as of June 2021, but these numbers

may increase considerably following the Taliban takeover of Afghanistan on 15 August 2021, adding pressure on the already difficult food security conditions of local households. According to the latest IPC analysis, about 3.8 million people were estimated to face high levels of acute food insecurity IPC Phase 3 (Crisis) or above between March and June 2021 in 19 districts analyzed in Balochistan and Sindh provinces. In **Myanmar**, the political crisis following the military takeover on 1 February 2021 has further compromised the already fragile food security situation of Rohingya’s internally displaced persons (IDPs). According to the latest figures from the United Nations High Commissioner for Refugees (UNHCR), July 2021, following the military takeover, an additional 200 000 people were displaced, adding

to the already existing 370 000 IDPs (as of 31 December 2020, UNHCR), mostly residing predominately in Rakhine, Chin, Kachin, Kayin and Shan states. Most IDPs suffer from high levels of food insecurity as the conflict limits people’s movements and disrupts their livelihoods, making them highly dependent on humanitarian assistance. In **the Democratic People’s Republic of Korea**, large numbers of people continue to suffer from low levels of food consumption and very poor dietary diversity. The persisting economic constraints, exacerbated by the impact of the COVID-19 pandemic, have contributed to worsening the food insecurity situation. The harvest of the 2021 main season will start in late September and the increase in households’ food supplies is foreseen to result in a transitory improvement in food security conditions.

Wheat flour retail prices in selected Far East countries

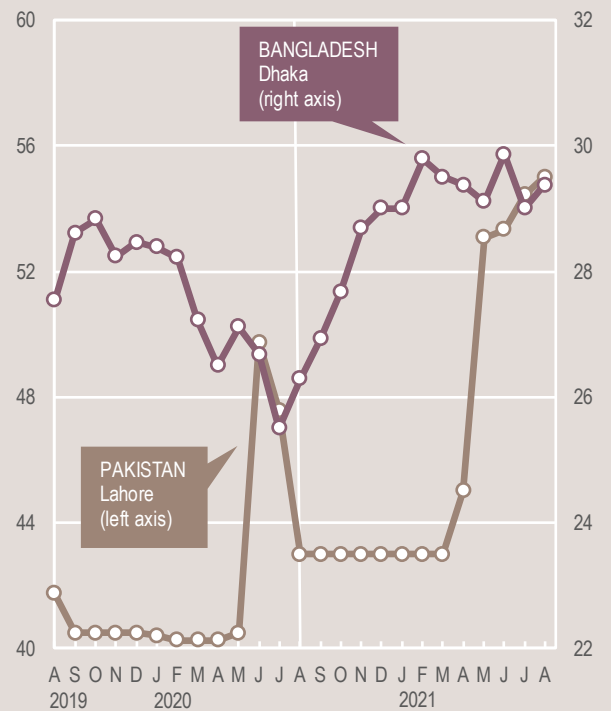
(Sri Lanka Rupee/kg) (Indian Rupee/kg)



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

Wheat flour retail prices in selected Far East countries

(Pakistan Rupee/kg) (Taka/kg)



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

NEAR EAST



Below-average cereal production forecast in 2021

Harvesting of the spring wheat and barley crops, as well as the maize crop, is ongoing, while the minor rice crop is expected to be harvested from October. The harvest of the main winter cereal crops was completed in July.

Erratic and insufficient rainfall during the cropping season reduced yield expectations across many countries in the subregion. Although seasonal rains started later-than-normal in November 2020, they provided generally adequate moisture for sowing, but below-average rainfall amounts during the following months caused soil moisture deficits in many areas across the subregion, particularly **Afghanistan**, central **Turkey**, eastern parts of the **Syrian Arab Republic**, northern Iraq and northeastern **Islamic Republic of Iran**. The high price and limited availability of fuel also prevented farmers from irrigating cereal crops, resulting in lower yields of the irrigated winter crops. Rainfed crops in the most important producing provinces in northwestern **Iraq** (Ninewa) and northeastern **Syrian Arab Republic** (Hassakeh) completely failed.

Total cereal production in 2021 is forecast at 69.8 million tonnes, about 4 percent below the average and about 13 percent (11 million tonnes) below the previous year's level. In **Iraq**, the 2021 cereal harvest is forecast at a slightly above-average level of 5.8 million tonnes, but about 34 percent below the previous year's excellent output. In the **Syrian Arab Republic**, a below-average harvest was gathered as a result of the drought in the main cereal producing areas and the difficult socio-economic situation across the country that hampered access to inputs. In the **Islamic Republic of Iran** and **Turkey**, the leading regional producers, the impact of drought was quite limited and farmers were able to adequately irrigate their crops. Authorities in **Turkey** put the 2021 cereal harvest at an average level of 35 million tonnes, about 5 percent below the 2020 level, while the 2021 harvest in the **Islamic Republic of Iran** is forecast at 20.2 million tonnes, about 9 percent below last year's average harvest. In **Afghanistan**, where structural issues, including the shortage of agricultural inputs, were exacerbated by poor rainfall, about 4.6 million tonnes of cereals are expected to be harvested, 15 percent below the average and 20 percent below the previous year's harvest. In **Yemen**, although weather conditions have been relatively favourable, the conflict continues to hinder agricultural activities by limiting the availability of and access to inputs.

Subregional cereal import requirements in the 2021/22 (July/June) marketing year are forecast at 76.8 million tonnes, about 7 percent (almost 5 million tonnes) above

the average. The wheat import requirement is estimated at 33.8 million tonnes, about 12 percent above the average, reflecting rising demand due to population growth and declining domestic production.

Large number of people remain food insecure, concerns about humanitarian situation in Afghanistan

Lingering conflicts, economic downturns and reduced livelihood opportunities continue to worsen food security conditions of a large number of people in the subregion.

In **Afghanistan**, from March to May 2021, corresponding to the end of the lean season, about 10.9 million people were estimated in IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency), representing one-third of the population analyzed. The IPC analysis, conducted before the withdrawal of foreign troops from the country in August 2021, estimated that during the harvest and post-harvest seasons, between June and November 2021, a slight improvement in the food security situation was expected, with the number of people in IPC Phase 3 (Crisis) or above decreasing to 9.5 million. Since the Taliban seized control of the country in August, the already fragile security, economic and social situation of the country has worsened due to increases in violence and population displacements. Over 570 000 people were displaced by conflict between January and August 2021, compared to 134 000 over the same period last year. UNHCR reported that 2.23 million refugees were registered in Pakistan and the Islamic Republic of Iran as of the end of July 2021. The refugee figures, both of registered and

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Near East	45.2	49.0	42.7	22.3	25.6	21.9	5.3	6.0	5.2	72.8	80.6	69.8	-13.4
Afghanistan	4.4	4.7	3.7	0.4	0.4	0.3	0.6	0.7	0.6	5.4	5.7	4.6	-20.1
Iran (Islamic Republic of)	14.3	14.0	12.8	4.3	4.3	4.3	3.5	3.9	3.1	22.1	22.2	20.2	-8.9
Iraq	3.8	6.2	4.5	1.2	2.1	0.7	0.0	0.5	0.5	5.2	8.8	5.8	-34.4
Turkey	20.3	20.5	19.0	14.2	15.6	15.0	0.9	1.0	1.0	35.5	37.1	35.0	-5.4

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

not registered refugees, are likely to increase. The worsening security situation and lack of experience in operating governmental institutions will have a negative impact on the country's economic performance, including the ability to import food staples. In addition, vulnerable households with limited income-earning opportunities continue to be affected by increasing number of COVID-19 cases as the vaccination campaign progress remains very slow.

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

CIS IN ASIA



Cereal production in 2021 forecast below average in Kazakhstan

Harvesting of the 2021 winter cereal crops was completed in August, while spring cereals, which account for approximately 70 percent of the annual grain output, are being harvested. The total 2021 subregional³ cereal output is forecast at 31.8 million tonnes, 10 percent below the five-year average, mainly due to reduced wheat and barley outputs. In **Kazakhstan**, drier and warmer-than-average weather conditions since May negatively affected spring wheat and barley crops in the main producing Kostanay and Akmola provinces. As a result, the 2021 aggregate wheat and barley outputs in the country (including

the minor winter crops) are forecast at 12 million and 3 million tonnes, respectively, well below the five-year average levels.

Wheat outputs are also forecast at below-average levels in **Turkmenistan** and **Uzbekistan**, following unfavourable weather conditions during the season, and in **Armenia** and **Azerbaijan**, due to below-average planted areas. Near-average outputs are expected in **Georgia**, **Kyrgyzstan** and **Tajikistan**.

Near-average wheat exports forecast in 2021/22

In the 2021/22 marketing year (July/June), the subregional import requirement of cereals, mainly wheat, is forecast at 9.4 million tonnes, 11 percent above average, mainly due to large import needs for wheat in **Armenia**, **Azerbaijan** and **Uzbekistan**, reflecting the below-average 2021 wheat outputs. Total cereals exports from **Kazakhstan** are forecast at 8.7 million tonnes, 6 percent below the average volume. Despite the reduced output in 2021, wheat exports are forecast at a near-average level of 7.5 million tonnes due to continued robust export demand.

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
CIS in Asia	25.1	25.3	22.0	9.1	9.4	8.7	35.3	35.9	31.8	-11.3
Armenia	0.2	0.1	0.1	0.1	0.1	0.1	0.3	0.2	0.2	-14.4
Azerbaijan	1.9	1.9	1.8	1.2	1.4	1.3	3.2	3.3	3.2	-2.0
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	-7.6
Kazakhstan	13.9	14.3	12.0	4.9	5.0	4.4	19.3	19.8	16.9	-14.8
Kyrgyzstan	0.6	0.6	0.6	1.1	1.2	1.2	1.8	1.9	1.9	-1.3
Tajikistan	0.9	0.8	0.8	0.4	0.3	0.4	1.3	1.3	1.3	2.3
Turkmenistan	1.3	1.5	1.1	0.1	0.1	0.1	1.5	1.7	1.3	-23.4
Uzbekistan	6.1	6.0	5.4	1.0	1.0	1.0	7.4	7.3	6.7	-8.2

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

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

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

By contrast, barley exports are projected at 1 million tonnes, well below the average volume.

Export prices of wheat strengthen in Kazakhstan due to expectations of reduced output

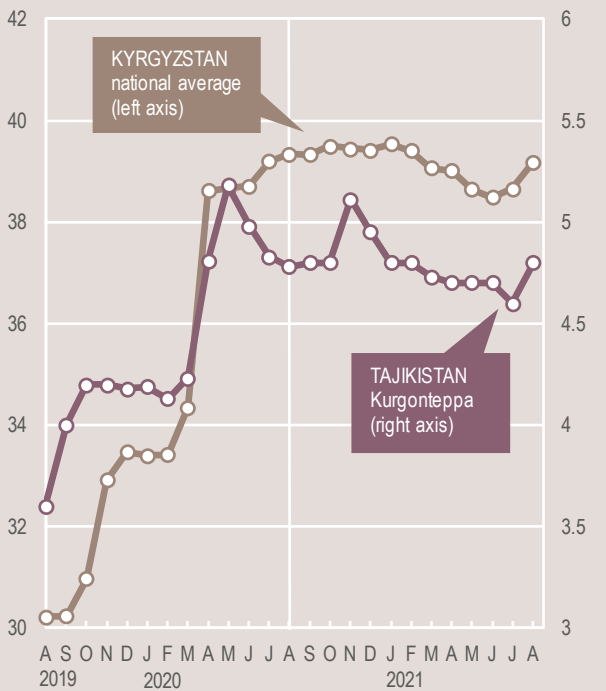
In **Kazakhstan**, after a slight decline between March and June 2021, export prices of wheat increased sharply in July and August 2021. In these countries, prices in

August, reaching higher year-on-year levels. The recent steep increases reflect concerns over the impact of unfavourable weather conditions on wheat production in 2021.

In the importing countries of the subregion, retail prices of wheat flour remained stable in **Tajikistan** and **Kyrgyzstan** between February and August 2021. In these countries, prices in

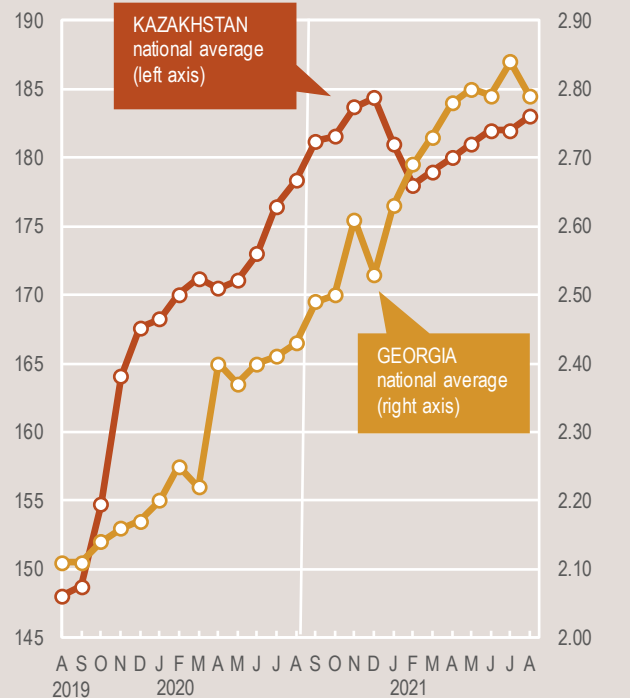
August were close to the generally high levels of a year earlier, underpinned by the effects of the COVID-19 pandemic and the depreciation of the national currencies. In **Georgia**, wheat prices increased between January and August 2021, reaching levels above those in August 2020, reflecting higher export quotations in the Russian Federation, the main wheat supplier of the country.

Retail wheat flour prices in selected CIS in Asia countries
(Som/kg) (Somoni/kg)



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

Retail wheat flour prices in selected CIS in Asia countries
(Tenge/kg) (Lari Georgia/kg)



Sources : Agency for Strategic Planning and Reforms of the Republic of Kazakhstan Bureau of National Statistics; National Statistics Office of Georgia.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN



Unfavourable 2021 production prospects*

Bolivia (Plurinational State of): Adverse weather conditions

** See Terminology (page 6).

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

Source: GIEWS, 2021. *Crop Prospects and Food Situation #3* [online]. [Cited 23 September 2021], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

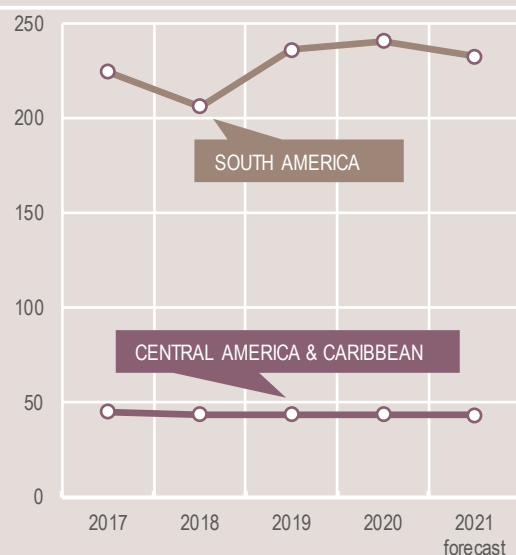
Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean is forecast at 276 million tonnes in 2021, about 5 percent above the five-year average. The expected large outturn mostly reflects above-average cereal outputs in South America, driven by an all-time high maize acreage. However, unfavourable rains in several countries curbed yields and resulted in a year-on-year production decline for maize. Regarding wheat, which will be harvested in the last quarter 2021, a preliminary forecast points to an above-average production, reflecting a large sown area.

In Central America, a slightly below-average cereal output is anticipated in Mexico as dry weather conditions in early 2021 affected the minor maize and main sorghum crops. Elsewhere in the subregion, the 2021 main season maize crop is being harvested and production is expected at a near-average level, while the earthquake and tropical depression in Haiti caused crop damage and losses.

Cereal production

(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN



Wheat production forecast at an average level in 2021

In **Mexico**, harvesting of the 2021 main winter wheat crop, which accounts for about 95 percent of the subregional output, was completed in July and production is estimated at an average level as good yields compensated for the reduced level of plantings. Sowing of the 2021 minor season wheat crop was recently completed and the area planted is estimated at a near-average level. Overall, the aggregate wheat production in 2021 is forecast at an average level of 3.3 million tonnes.

Near-average maize production forecast in 2021

The total subregional maize output is forecast at a near-average level of 31.8 million tonnes in 2021. In **Mexico**, the leading cereal producer in the subregion, the main maize crop is at

flowering and grain filling stages, and satellite-based analysis indicates favourable crop conditions especially in the main producing central region. However, the annual maize production is expected at a slightly below-average level of 27.2 million tonnes in 2021 due to a reduced output from the minor season crop that was affected by rainfall deficits. Low precipitation amounts also affected the main sorghum crop and as a result the 2021 output is forecast to be more than 10 percent below the five-year average.

Elsewhere in the subregion, harvesting of the 2021 main season maize crop is ongoing and the preliminary forecast points to an average output. Production is expected at an above-average level in **El Salvador**, mainly reflecting good yields. In localized areas of southern **Honduras** and northern **Nicaragua**, dry spells early in the season caused severe moisture deficits that were not reversed by the abundant late rains. In the second half of August, some crops that were ready to be harvested were affected by torrential rains in southern **Guatemala** and western **Nicaragua**. Planting of the minor season maize crop will start at the end of September and the production outlook is generally favourable, based on forecasts of a higher-than-normal likelihood of average seasonal rains.

In **the Dominican Republic**, production of rice, a crop that is grown under irrigation, is expected at an above-average level in 2021, underpinned by large plantings. In **Haiti**, the 2021 second minor maize and main rice crops are currently at vegetative to flowering stages of development. Crop yields are forecast at low levels due to soil moisture deficits in the northern area as well as natural disasters that severely affected crops in southern regions. Below-average precipitation is forecast in the October–December period, further curtailing production prospects. The main maize and minor rice crops were harvested earlier in the year and are estimated at below-average levels due to reduced acreages.

Cereal imports forecast at high levels in 2021/22

In recent years, cereal imports in the subregion have been increasing on a yearly basis, driven by rising demand for yellow maize by the feed industry. However, in the 2020/21 marketing year (September/August), imports declined year on year owing to large carryover stocks and high import costs. The recent upward trend is however expected to return in the 2021/22 marketing year, with cereal imports forecast at an above-average level of 37 million tonnes.

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
Central America and the Caribbean	3.3	3.0	3.3	38.2	37.8	37.2	2.9	2.8	2.9	44.4	43.6	43.5	-0.3
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	0.1
Guatemala	0.0	0.0	0.0	2.0	1.9	2.0	0.0	0.0	0.0	2.0	2.0	2.1	3.7
Honduras	0.0	0.0	0.0	0.7	0.6	0.7	0.1	0.0	0.1	0.7	0.7	0.7	5.1
Mexico	3.3	3.0	3.3	33.3	33.1	32.4	0.3	0.3	0.3	36.9	36.4	36.1	-1.0
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.5	0.4	0.4	0.4	0.9	0.8	0.9	3.4

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

SPECIAL FEATURE

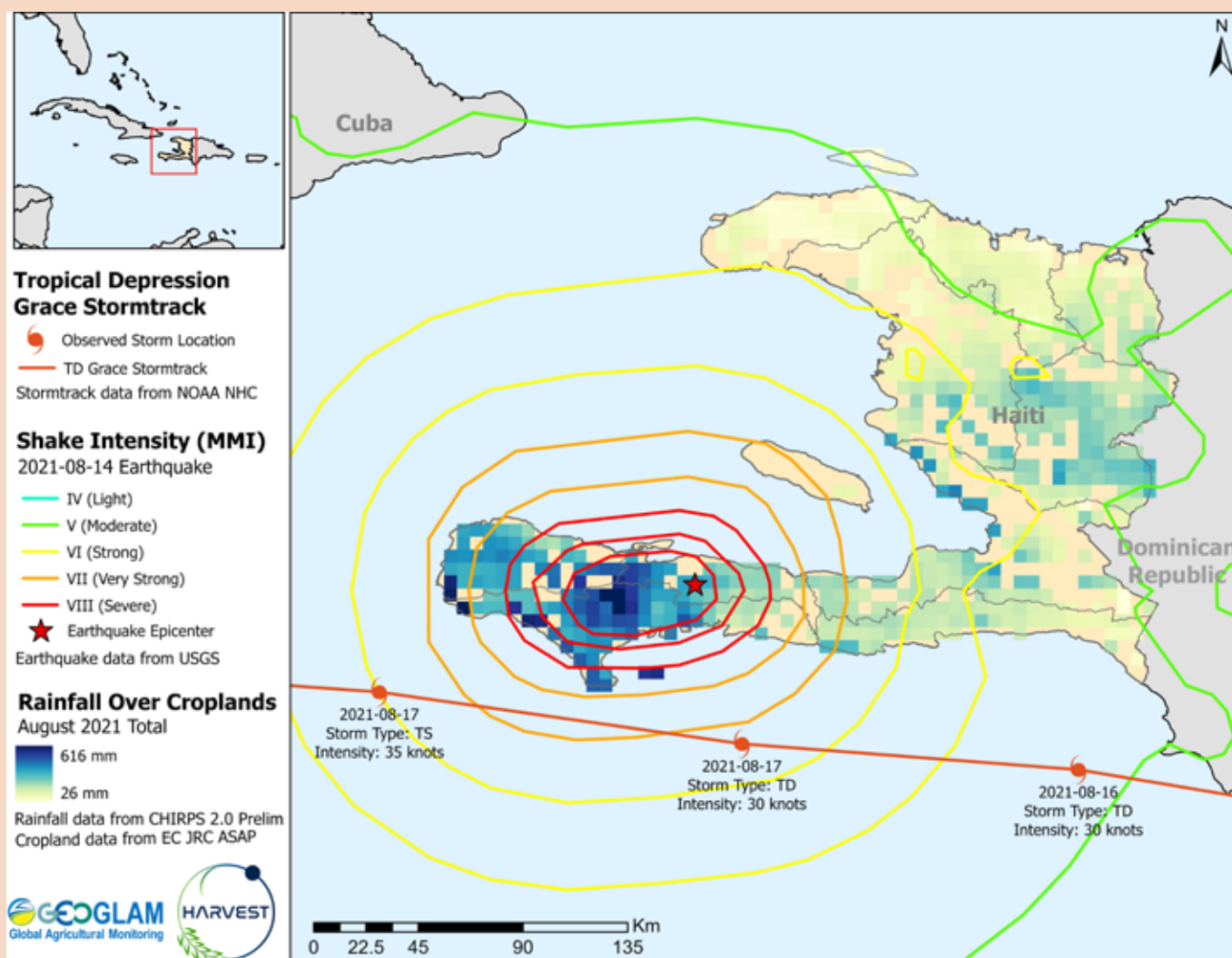
Haiti: Impacts of natural disasters aggravate an already alarming food insecurity situation

A 7.2-magnitude earthquake struck the southwestern region of Haiti on 14 August 2021, severely affecting the departments of Sud, Grand'Anse and Nippes. According to the latest official information, over 2 200 people have died, more than 12 000 people have been injured and hundreds are missing. The International Organization of Migration (IOM) estimates that about 8 300 people have been displaced in Sud and Nippes departments. The earthquake severely damaged housing and infrastructure, including an electricity power station in the Sud Department, water systems, roads, hospitals and schools. Two days after the earthquake, tropical depression Grace brought heavy rains and strong winds in Sud and Sud-Est departments, triggering flooding and increasing the risk that damaged buildings may collapse.

Destruction of productive assets and infrastructure as well as losses of stored food are likely to affect livelihoods, aggravating an already alarming food insecurity situation. In the affected departments, food security has been steadily deteriorating since 2018, mainly due to declining availabilities of staple food and worsening access to food. The negative impact of the COVID-19 pandemic on the local economy and violence has further contributed to the recent deterioration of the overall food insecurity situation. According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 980 000 people in the four affected departments (about 45 percent of the local population) are estimated to be severely food insecure IPC Phase 3 (Crisis) and above between September 2021 and February 2022, up from the 932 000 people between March and June 2021.

The United Nations have appealed for USD 187 million to provide humanitarian assistance to about 500 000 people affected by the disasters. FAO, together with the National Coordination for Food Security (CNSA) and the World Food Programme (WFP), appealed for USD 40 million, aiming to provide food assistance to about 160 000 people and to restore agricultural production and livelihoods of affected households.

Haiti: Earthquake intensity and accumulated rainfall, August 2021



Prices of maize increased seasonally in the June–August period

Prices of white maize increased between June and August 2021, reflecting seasonally tight supplies in **El Salvador, Guatemala, Honduras** and **Nicaragua**. In Guatemala, a weakening of prices was reported at the end of August as newly harvested crops increased market availabilities. In **Mexico**, prices were steady or decreased in the June–August period due to the commercialization of the minor season harvest that was completed in July, together with large imports in the second quarter of 2021. However, prices were still well above their year-earlier levels following sustained increases in the first half of 2021, supported by rising international prices and high production costs.

With regard to beans, prices were stable or decreased in the June-August period reflecting adequate market availabilities and weak retail demand. Prices of black beans were stable in **Guatemala** reflecting ample

carryover stocks and in **Mexico** due to large imports during the first half of 2021. In these countries, prices were below the high levels of the previous year. Prices of red beans decreased in August in **El Salvador, Honduras** and **Nicaragua** as markets are well supplied with abundant carryover stocks from the 2020 harvests.

Prices of black beans and rice have increased between June and August in **the Dominican Republic**, supported by high production costs. In **Haiti**, prices of maize meal declined in June and July with the harvest of the 2021 main season crops. Prices of rice, mostly imported, continued to rise in July reflecting the weakening of the currency. Additional upward pressure was exerted by low imports during the first five months of 2021. A volatile insecurity and socio-political situation have resulted in disruptions to market and trade activities, including road blockages, with negative effects on access to food. Damages to infrastructure and market facilities caused by the earthquake

could trigger price spikes in the affected south region.

Food security forecast to improve in Guatemala

According to the latest IPC analysis, in **Guatemala** the number of food insecure people who require urgent humanitarian assistance is forecast at 2.5 million between September 2021 and January 2022, down from 3.5 million between May and August 2021. The expected improvement mainly reflects an increase in the availability of staple foods following the main season harvest, coupled with a seasonal increase in income-earning opportunities (cash crops). While food security assessments are currently ongoing in other countries, similar improvements are expected, underpinned by improved food availability and access owing to a recovery of economic activities following the partial removal of COVID-19-related restrictions. The notable exception is Haiti, where the food insecurity situation continues to worsen, especially in the disaster-affected areas.

Wholesale white maize prices in selected Central America countries

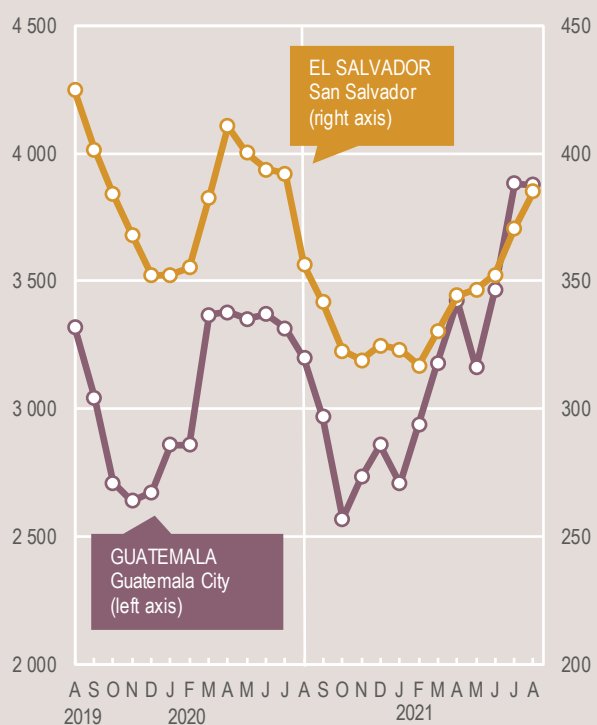
(Cordoba Oro/tonne) (Lempira/tonne)



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

Wholesale white maize prices in selected Central America countries

(Quetzal/tonne) (US dollar/tonne)



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

SOUTH AMERICA



Maize production expected at an above-average level in 2021

Harvesting of the 2021 maize crop is complete in the major producing countries of **Argentina, Brazil and Paraguay**. The 2021 subregional production is forecast at 160 million tonnes, about 5 percent above the previous five-year average. However, a decline in production in Brazil contributed to a year-on-year reduction in the subregional output following two years of bumper harvests.

In **Brazil**, the main season crops were severely affected by drought conditions followed by cold spells in the key producing central and southern regions between April and July. As a result, crop yields were estimated to be below average, resulting in an annual production decline of more than 15 percent. The total maize output is officially estimated at 86.6 million tonnes in 2021, only slightly below the average, as a record large area planted compensated for the sharp decline in

yields. Similarly, in **Paraguay**, unfavourable weather conditions affected crops at critical flowering and grain filling stages and the 2021 output is forecast at a near-average level of 5.4 million tonnes. By contrast, production in **Argentina** is officially estimated at a record-high level of 60.5 million tonnes, resting on an all-time high maize acreage. The planted area increased for the sixth consecutive year in 2021, driven by high domestic prices and strong export demand. In **Uruguay**, the area sown is also estimated at a record level and consequently production is forecast to be above average in 2021. Elsewhere, harvesting of the 2021 second season crops is nearing completion in Bolivia (Plurinational State of), Colombia and Peru, and is ongoing in Ecuador. In **Bolivia (Plurinational State of)**, a below-average output is expected as dry weather conditions in the July–August period in the key producing eastern areas lowered yield prospects. Harvests in **Colombia and Ecuador** are expected at above-average levels on account of favourable weather conditions that have boosted yield expectations. In **Peru**, reflecting average plantings, production is anticipated to be near average. In **Chile**, 2021 production is officially estimated to be about 15 percent below the average due to the low level of plantings, reflecting a general shift from the cultivation of maize to horticulture crops. In **Venezuela (Bolivarian Republic of)**, harvesting of the main season maize crop is ongoing at a slow pace due to shortages of diesel and the preliminary production forecast points to a well below-average output. The substantial decline in diesel

imports since the end of 2020, which reflects more stringent international sanctions, has caused significant disruptions to agricultural activities and resulted in reduced plantings as well as curtailing crop yield potentials. Heavy rains in late August in western producing areas also adversely affected standing crops and delayed harvesting operations.

The 2021 wheat crop is at flowering and grain filling stages across the subregion. Production prospects are favourable in **Argentina, Brazil and Uruguay** on account of large plantings, owing to remunerative prices and strong export demand. The sharpest expansion in plantings is reported in Brazil, where the 2021 planted area is estimated to be more than 25 percent higher than the five-year average. By contrast, in **Paraguay**, poor rainfall in July and August resulted in a reduced area sown and also affected early crop development.

The 2021 paddy harvest was completed in May in **Brazil and Uruguay**, where production is estimated to be about 3 percent above the average, as low plantings were more than offset by record-high yields. In **Colombia and Paraguay**, an above-average output is forecast primarily resting on large sowings. In **Peru**, where about 15 to 20 percent of the annual production is harvested during the last quarter of the year, the 2021 output is forecast at a near-average level and down from last year’s bumper harvest. The aggregate subregional output is expected at 25 million tonnes, slightly above the five-year average.

Table 16. South America cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
South America	28.0	27.8	31.6	165.3	188.0	175.9	24.5	24.9	25.1	217.8	240.7	232.5	-3.4
Argentina	18.7	17.6	19.2	56.6	65.5	69.4	1.3	1.2	1.4	76.6	84.3	90.0	6.7
Brazil	5.6	6.2	8.6	92.1	106.3	90.5	11.3	11.2	11.7	109.0	123.7	110.9	-10.4
Colombia	0.0	0.0	0.0	1.4	1.4	1.4	2.7	3.0	2.9	4.1	4.4	4.3	-2.1
Paraguay	1.1	1.3	1.1	5.5	5.9	5.5	1.0	1.2	1.1	7.6	8.4	7.6	-8.8
Peru	0.2	0.2	0.2	1.8	1.7	1.8	3.3	3.4	3.2	5.2	5.3	5.2	-2.1

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

Cereal exports forecast to remain above average but down year on year in 2021/22

Aggregate cereal exports in the 2021/22 marketing year (March/February), mainly maize, are forecast at 85 million tonnes, about 6 percent above the five-year average. The expected volume reflects an annual decline of 10 percent, as the exportable surplus of maize is expected to decline in Brazil, the major exporter. Maize exports are forecast at 62 million tonnes, more than 17 percent lower than 2020/21. By contrast, wheat exports are forecast at a high level of 15 million tonnes, mainly reflecting the expected bumper harvest in Argentina.

Prices of wheat and yellow maize strengthened in 2021

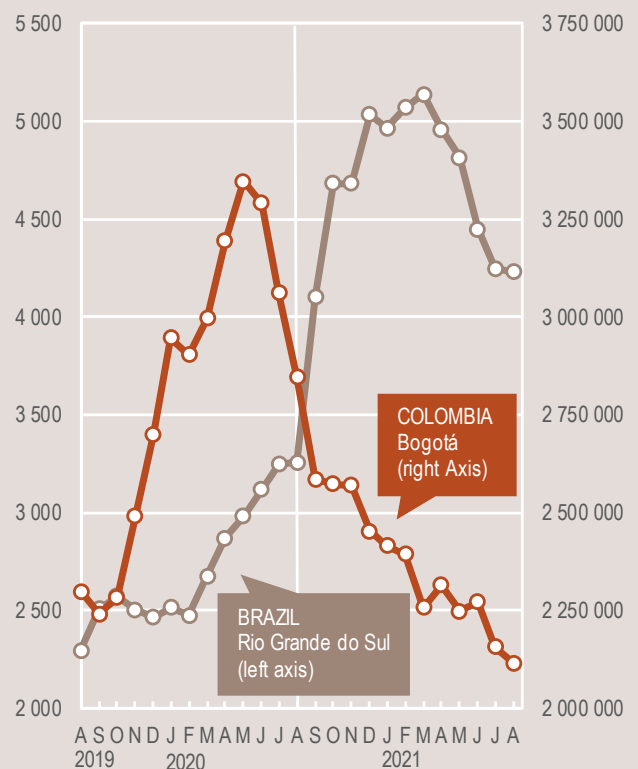
As of August 2021, the average price of wheat and yellow maize was higher year on year, mainly attributed to the upward pressure from robust demand within the subregion and high international prices. High production and transportation costs also contributed to the high price levels. In **Brazil**, prices of yellow maize increased in July and August despite the ongoing

harvest, as tight supply prospects from the below-average 2021 output exerted strong upward pressure. By contrast, prices were stable in **Argentina**, with improved availabilities from the record harvest.

In **Argentina**, prices of wheat increased in August after declines in the previous two months, driven by concerns over the impact of dry weather conditions on crop production. In **Chile** and **Uruguay**, prices increased in the June–August period in line with seasonal trends. By contrast, prices were stable in **Brazil** as seasonally tight supplies were offset by larger year-on-year imports in

Wholesale rice prices in selected countries in South America

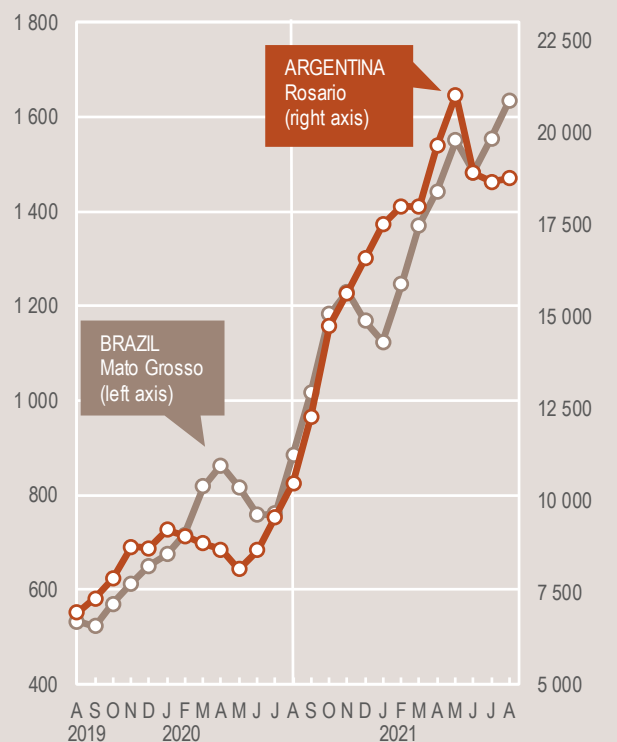
(Brazilian Real/tonne) (Colombian Peso/tonne)



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

Wholesale maize prices in selected countries in South America

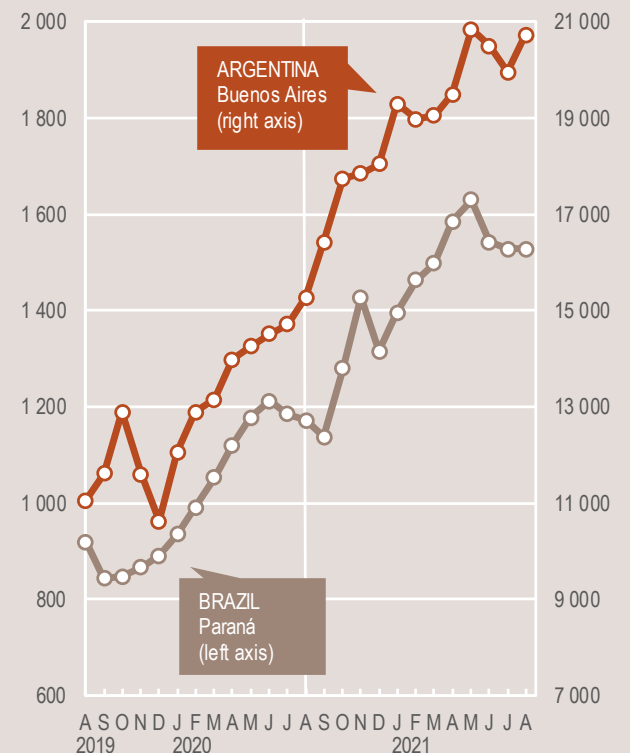
(Brazilian Real/tonne) (Argentine Peso/tonne)



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

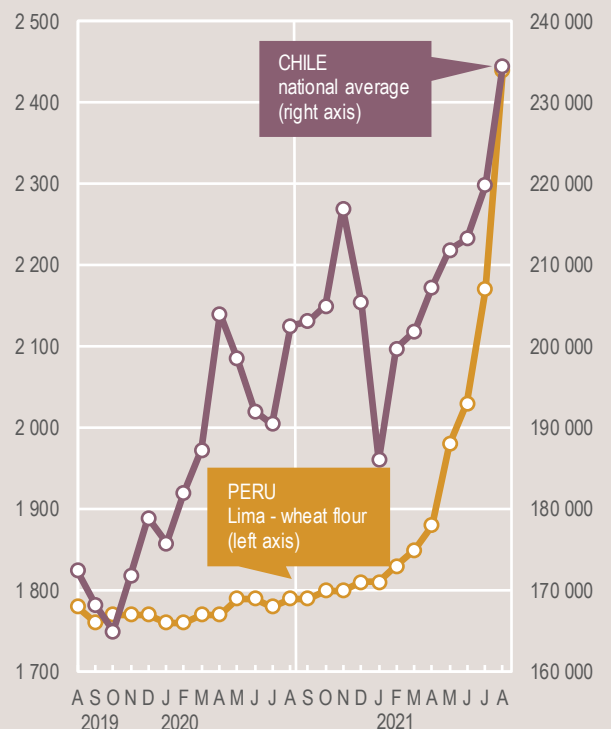
Wholesale wheat prices in selected countries in South America

(Brazilian Real/tonne) (Argentine Peso/tonne)



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

Wholesale wheat prices in selected countries in South America
(Nuevo Sol/tonne) (Chilean Peso/tonne)



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

the second quarter of 2021. In importing countries, wheat prices increased in **Colombia, Ecuador** and **Peru**, reflecting spill-over effects from the international market, where benchmark prices have been climbing.

With regard to rice, prices were overall stable in the June–August period in **Brazil, Ecuador, Peru** and **Uruguay**, reflecting adequate market supplies. In **Colombia**, the start of the main crop harvest in July exerted downward pressure on prices in July and August. As of August, prices in Colombia, Ecuador and Peru were below their year-earlier levels due to large carryover stocks from the 2020 bumper harvests.

More than 3 million Venezuelan migrants in need of food assistance

In **Venezuela (Bolivarian Republic of)**, the economy is forecast to contract for an eighth consecutive year. The total number of Venezuelan refugees and migrants are estimated at 5.6 million (nearly 20 percent of the population) as of August 2021, who are mostly settled in Colombia (1.7 million), Peru (1 million), Chile (457 000) and Ecuador (433 000). Migration flows are likely to continue as the negative effects of the COVID-19 pandemic have compounded the already severe macro-economic crisis. The sustained flux of Venezuelan migrants in neighbouring countries is expected to further strain health and sanitation services, as well as food supplies in areas near the borders. According to the Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela, the number of Venezuelan refugees and migrants (including in transit and temporary) in need of food assistance in 2021 is estimated at about 3.26 million.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

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



** See Terminology (page 6)

Source: GIEWS, 2021. *Crop Prospects and Food Situation #3* [online]. [Cited 23 September 2021], modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

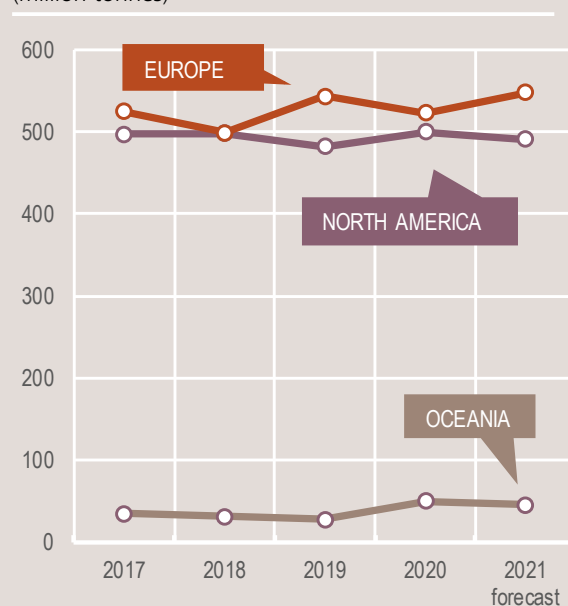
North America, Europe and Oceania Production Overview

Prolonged periods of reduced rainfall amounts resulted in several downward revisions to the cereal production forecast in North America. However, while in the United States of America cereal production is still expected to grow year on year to an above-average level reflecting good prospects for the maize crop, the rainfall deficits sharply lowered expectations in Canada and total cereal production in 2021 is forecast to fall below the five-year average.

In the European Union, reflecting generally beneficial weather conditions and a price-driven expansion in plantings, cereal production is forecast to increase in 2021, but still remain lower than average. Comparably conducive conditions prevailed in the United Kingdom of Great Britain and Northern Ireland and a production upturn is estimated in 2021. In the CIS European countries, the aggregate cereal output is forecast at a slightly above-average level, as a bumper cereal harvest in Ukraine is expected to more than offset a near-average output in the Russian Federation.

In Australia, high prices spurred an expansion in wheat plantings and although yields are expected to decline compared to the highs of the previous year, production is forecast at an above-average level in 2021.

Cereal production (million tonnes)



NORTH AMERICA



Drought conditions curb production expectations in 2021

In the **United States of America**, persisting rainfall shortages during the summer months have curtailed yield prospects and resulted in a sizeable cutback to the production forecast. However, at 446.1 million tonnes, total 2021 cereal production is still forecast to exceed the five-year average by 1 percent, with an increase by 3 percent compared to the previous year's outturn. The foreseen growth is driven by good prospects for maize production, which is forecast at an above-average level of 377 million tonnes. Wheat production, by contrast, is forecast at 46.2 million tonnes, lower than the five-year

average and below the 2020 outturn. Although winter wheat production, which accounts for the bulk of the annual wheat output, is estimated to have increased in 2021, the spring wheat crop has been decimated by drought conditions, dragging down the overall production outlook in 2021.

In **Canada**, a prolonged period of below-average rainfall between June and mid-August adversely affected cereal crops and total production is forecast at 45.2 million tonnes in 2021, 25 percent lower than the five-year average. The reduction is mostly due to an expected lower wheat output, as significant rainfall deficits have affected yields of spring crops and the annual production is forecast at about 20 million tonnes, 10 million tonnes below the five-year average. The maize crops have been less affected by the unfavourable weather conditions and the 2021 output is forecast at 14.2 million tonnes, marginally above the average.

EUROPE



EUROPEAN UNION

Cereal production to increase in the European Union in 2021

In the **European Union**, aggregate cereal production in 2021 is pegged at 297.3 million tonnes, slightly below the average, but 5 percent higher year on year. The yearly increase is driven by a large wheat output, forecast at 136.4 million tonnes, about 9 percent above the weather-reduced harvest in 2020, reflecting a price-driven expansion in the acreage and higher yields. Production of maize, with the harvest still underway, is forecast at 73.1 million tonnes, 12 percent above the 2020 level, largely underpinned by

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	5-yr Avg.	2020 estim.	2021 f'cast	Change: 2021/2020 (%)
North America	85.2	84.9	66.4	407.7	404.7	416.0	9.4	10.3	9.0	502.4	499.9	491.3	-1.7
Canada	32.5	35.2	20.2	27.6	29.8	25.0	0.0	0.0	0.0	60.0	64.9	45.2	-30.4
United States of America	52.8	49.7	46.2	380.2	374.9	391.0	9.4	10.3	9.0	442.4	435.0	446.1	2.6
Europe	257.2	253.6	267.2	259.2	265.5	276.8	4.0	4.0	3.9	520.5	523.2	547.9	4.7
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	-7.8
European Union ¹	143.1	125.3	136.4	157.4	155.2	158.2	2.9	2.8	2.7	303.4	283.4	297.3	4.9
Russian Federation	78.4	85.9	78.0	41.9	43.1	42.9	1.1	1.1	1.1	121.4	130.2	122.0	-6.2
Serbia	2.7	2.9	3.2	7.3	8.6	8.5	0.0	0.0	0.0	10.0	11.4	11.7	2.3
Ukraine	26.0	24.9	29.5	40.9	39.7	47.8	0.1	0.1	0.1	67.0	64.6	77.3	19.6
Oceania	24.2	33.8	30.4	14.5	16.3	14.8	0.4	0.1	0.5	39.1	50.2	45.7	-9.0
Australia	23.8	33.3	30.0	13.9	15.7	14.1	0.4	0.1	0.5	38.1	49.1	44.6	-9.1

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

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

an expected upturn in yields following conducive summer rainfall.

Production of wheat in **the United Kingdom of Great Britain and Northern Ireland**, with most of the harvest complete, is forecast to increase to about 15 million tonnes in 2021, owing to both a large expansion in plantings and yields.

CIS IN EUROPE

Above-average cereal production forecast in 2021 due to large output expected in Ukraine

Harvesting of the 2021 winter cereals (mainly wheat) was completed in August, while harvesting of spring crops is ongoing and is expected to finalize in November. The 2021 subregional cereal output is forecast at about 210 million tonnes, 6 percent above the five-year average level. The result mainly reflects expectations of a large cereal output in **Ukraine**, where maize and wheat harvests are forecast at well above-average levels due to large plantings and favourable weather conditions that boosted yield prospects. In **the Russian Federation**, the total cereal output is forecast at 122 million tonnes in 2021, a near-average outturn. Production of wheat is forecast at a near-average level of 78 million tonnes, despite a large planted area, as yields were affected by unfavourable weather conditions in July and August in parts of the key producing Central, Volga and Urals federal districts. The maize output is forecast at 15 million tonnes, approximately 10 percent above the five-year average, due to large plantings, while barley production

is expected at a near-average level of 20 million tonnes. In **the Republic of Moldova**, the 2021 aggregate cereal output is forecast at about 3.4 million tonnes, well above the drought-reduced output in the previous year and the five-year average. The production upturn reflects a return to favourable weather conditions this season that resulted in above-average yields. In Belarus, the 2021 total cereal output is foreseen at a near-average level of 7.7 million tonnes.

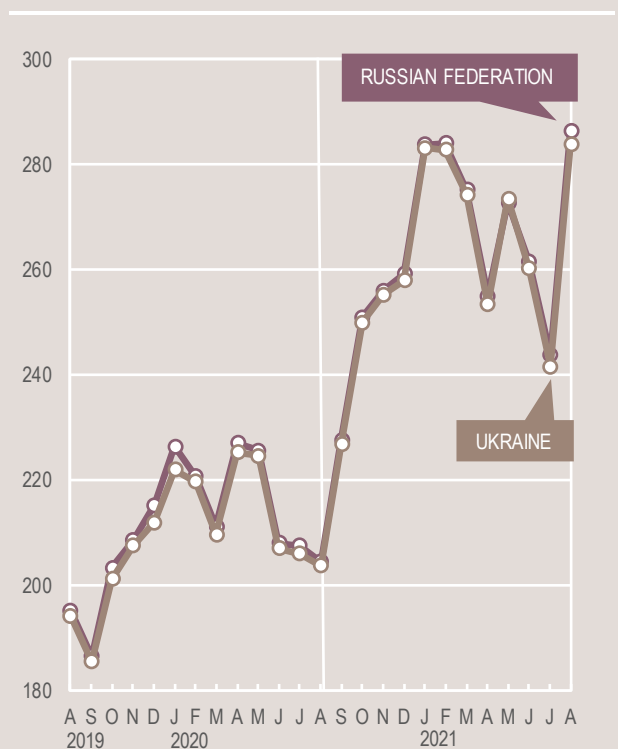
Cereal exports in the 2021/22 marketing year forecast above the average

Aggregate cereal exports in the 2021/22 marketing year (July/June) are forecast at 104 million tonnes, 12 percent above the five-year average, primarily due to large maize and wheat exports from **Ukraine**, projected at 30 million and 20.5 million tonnes, respectively. Additionally, strong export demand for Russian wheat is expected to continue in 2021/22 and underpins the export forecast of 37 million tonnes, which is 5 percent above the five-year average. Total subregional wheat exports are forecast at 58 million tonnes, 8 percent higher than the average, while maize shipments are projected at 35 million tonnes, 21 percent above the average.

Up-tick in wheat export prices

In **the Russian Federation and Ukraine**, the main wheat exporting countries of the subregion, export prices of milling wheat declined in June and July with the start of the 2021 winter wheat harvest period. By August, however, with increasing concerns over global production prospects, prices of wheat increased sharply in both countries. Similarly, in the domestic markets, wholesale prices of milling wheat increased in the Russian Federation and, particularly, in Ukraine, reaching higher year-on-year levels.

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



Source : International Grains Council.

OCEANIA



Cereal production expected to decline but remain above average in 2021

In **Australia**, the 2021 wheat crop is being harvested and production is forecast at an above-average level of 30 million tonnes. The good output reflects expectations of above-average yields, although down from the highs of 2020, and a small increase in the area planted, triggered by remunerative grain prices. Production of barley is forecast to decline to a near-average level of 10.4 million tonnes, due to a contraction in plantings that is likely to offset an increase in yields.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2016/17 - 2020/21	2017/18	2018/19	2019/20	2020/21	2021/22	
Ratio of world stocks to utilization (%)							
Wheat	37.0	38.5	36.3	36.6	37.3	36.2	
Coarse grains	25.4	27.4	25.8	24.1	22.6	21.6	
Rice	35.6	35.3	36.9	35.7	35.4	35.2	
Total cereals	30.5	32.0	30.8	29.7	29.0	28.1	
Ratio of major cereal exporters' supplies to market requirements (%)¹							
	119.4	122.8	116.7	118.5	115.5	112.0	
Ratio of major exporters' stocks to their total disappearance (%)²							
Wheat	18.0	20.9	18.0	15.4	15.8	13.8	
Coarse grains	14.3	15.5	15.8	14.4	10.9	10.9	
Rice	21.8	18.1	22.5	24.5	25.1	25.9	
Total cereals	18.0	18.2	18.8	18.1	17.3	16.9	
	Annual trend growth rate 2011-2020	2017	2018	Change from previous year 2019		2020	2021
Changes in world cereal production (%)							
	1.8	1.1	-1.7	2.4	2.2	0.7	
Changes in cereal production in the LIFDCs (%)							
	3.1	1.6	4.2	3.0	2.4	-1.2	
		2018	2019	2020	2021*	Change 2021* over 2020*	
Selected cereal price indices³							
Wheat		99.0	95.3	100.7	122.6	26.1%	
Maize		99.1	94.6	100.8	142.7	53.8%	
Rice		106.3	101.5	110.2	109.1	-1.1%	

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-August average.

Table A2. World cereal stocks

(million tonnes)

	2017	2018	2019	2020	2021 estimate	2022 forecast
TOTAL CEREALS	826.2	859.8	834.7	822.1	815.6	808.6
Wheat	266.2	288.9	272.3	277.9	289.9	284.1
held by:						
- main exporters ¹	79.9	84.2	70.7	62.8	62.2	53.9
- others	186.3	204.7	201.6	215.1	227.7	230.2
Coarse grains	386.3	394.1	376.2	361.0	341.3	339.4
held by:						
- main exporters ¹	118.7	128.8	129.6	123.7	96.0	94.3
- others	267.6	265.3	246.6	237.3	245.3	245.1
Rice (milled basis)	173.7	176.9	186.2	183.1	184.3	185.1
held by:						
- main exporters ¹	33.2	32.3	39.5	43.6	46.6	48.6
- others	140.5	144.6	146.7	139.5	137.7	136.5
Developed countries	196.1	197.2	188.8	176.1	153.1	152.2
Australia	9.5	7.3	7.5	5.7	9.3	11.4
Canada	12.5	11.1	9.4	9.5	7.7	4.8
European Union ²	33.2	42.8	41.9	43.5	34.7	36.7
Japan	6.6	6.7	6.5	6.9	7.5	7.3
Russian Federation	21.0	23.7	15.3	13.8	18.0	14.6
South Africa	1.8	5.1	3.6	2.6	3.9	4.8
Ukraine	8.4	8.0	7.2	4.8	4.9	6.4
United States of America	95.8	88.8	91.3	80.7	55.2	51.8
Developing countries	630.1	662.7	645.8	646.0	662.5	656.4
Asia	533.2	546.1	531.9	536.9	555.5	557.9
China (mainland)	393.0	401.0	385.6	381.9	387.9	391.7
India	35.5	43.5	51.7	58.6	63.5	64.8
Indonesia	9.2	10.2	11.5	9.0	7.7	8.0
Iran (Islamic Republic of)	11.6	10.6	9.1	9.8	11.3	10.7
Korea, Republic of	4.5	4.1	2.6	2.6	2.9	3.5
Pakistan	6.0	5.4	3.5	2.2	4.8	5.6
Philippines	3.7	4.1	4.8	4.0	4.0	4.2
Syrian Arab Republic	1.5	2.1	2.2	3.2	4.1	2.3
Turkey	6.0	7.1	6.6	10.1	11.0	11.3
Africa	57.9	63.8	63.9	60.3	61.1	59.7
Algeria	5.6	5.3	6.6	6.9	6.8	5.4
Egypt	7.4	6.9	5.1	5.3	4.7	4.2
Ethiopia	4.8	5.6	6.3	7.3	6.9	6.1
Morocco	5.9	6.7	7.3	5.8	4.8	6.5
Nigeria	5.8	5.2	5.0	4.7	4.6	4.2
Tunisia	1.0	1.1	1.0	1.2	1.0	1.1
Central America and the Caribbean	9.7	10.3	10.0	9.9	7.8	6.6
Mexico	6.5	7.7	7.6	7.4	5.7	4.7
South America	28.7	41.8	39.3	38.2	37.6	31.7
Argentina	7.4	12.3	12.6	12.7	11.4	10.9
Brazil	12.7	20.2	16.9	15.9	16.7	12.4

Source: FAO

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

¹ Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are: Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are: India, Pakistan, Thailand, the United States of America and Viet Nam.² Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

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

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
2017/18	230	188	203	159	165	174
2018/19	232	210	233	166	166	163
2019/20	220	219	231	163	163	163
2020/21	269	254	263	220	225	264
Monthly						
2019 - August	203	197	238	162	151	147
2019 - September	200	200	228	157	145	149
2019 - October	212	213	229	168	157	164
2019 - November	220	225	198	167	167	162
2019 - December	225	238	203	168	173	165
2020 - January	237	249	226	172	185	167
2020 - February	230	240	240	170	180	165
2020 - March	227	230	243	162	170	165
2020 - April	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

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)

	Marketing year	2019/20 or 2020			2020/21 or 2021
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total imports (excl. re-exports)
AFRICA		27 398.3	1 167.6	28 565.9	30 715.2
East Africa		11 148.4	813.0	11 961.4	12 347.0
Burundi	Jan/Dec	166.3	15.0	181.3	184.0
Comoros	Jan/Dec	63.3	0.0	63.3	66.0
Eritrea	Jan/Dec	458.5	0.0	458.5	459.0
Ethiopia	Jan/Dec	2 035.0	50.0	2 085.0	2 090.0
Kenya	Oct/Sept	3 578.0	80.0	3 658.0	3 689.0
Rwanda	Jan/Dec	222.3	0.0	222.3	225.0
Somalia	Aug/Jul	695.0	210.0	905.0	1 005.0
South Sudan	Nov/Oct	630.0	95.0	725.0	715.0
Sudan	Nov/Oct	1 865.0	330.0	2 195.0	2 366.0
Uganda	Jan/Dec	525.0	23.0	548.0	573.0
United Republic of Tanzania	Jun/May	910.0	10.0	920.0	975.0
Southern Africa		3 138.2	15.7	3 153.9	3 768.0
Lesotho	Apr/Mar	153.7	0.6	154.3	196.1
Madagascar	Apr/Mar	726.2	8.0	734.2	746.4
Malawi	Apr/Mar	141.2	3.0	144.2	214.5
Mozambique	Apr/Mar	1 550.9	1.0	1 551.9	1 804.9
Zimbabwe	Apr/Mar	566.2	3.1	569.3	806.1
West Africa		10 677.2	182.9	10 860.1	11 796.2
Coastal Countries		5 670.9	56.5	5 727.4	6 426.5
Benin	Jan/Dec	181.0	6.0	187.0	468.0
Côte d'Ivoire	Jan/Dec	1 830.0	5.5	1 835.5	2 135.5
Ghana	Jan/Dec	1 466.9	5.0	1 471.9	1 555.0
Guinea	Jan/Dec	917.0	5.5	922.5	857.5
Liberia	Jan/Dec	500.0	13.0	513.0	543.0
Sierra Leone	Jan/Dec	486.0	21.0	507.0	507.0
Togo	Jan/Dec	290.0	0.5	290.5	360.5
Sahelian Countries		5 006.3	126.4	5 132.7	5 369.7
Burkina Faso	Nov/Oct	731.8	9.0	740.8	765.0
Chad	Nov/Oct	163.0	41.6	204.6	219.6
Gambia	Nov/Oct	288.5	6.5	295.0	273.0
Guinea-Bissau	Nov/Oct	178.0	6.3	184.3	169.3
Mali	Nov/Oct	461.2	0.0	461.2	481.0
Mauritania	Nov/Oct	549.8	21.0	570.8	560.8
Niger	Nov/Oct	570.0	36.0	606.0	646.0
Senegal	Nov/Oct	2 064.0	6.0	2 070.0	2 255.0
Central Africa		2 434.5	156.0	2 590.5	2 804.0
Cameroon	Jan/Dec	1 323.9	10.0	1 333.9	1 481.0
Congo	Jan/Dec	337.0	2.0	339.0	325.0
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	880.0
Sao Tome and Principe	Jan/Dec	21.2	1.0	22.2	22.0

Source: FAO

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

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

(thousand tonnes)

	Marketing year	2019/20 or 2020			2020/21 or 2021
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total imports (excl. re-exports)
ASIA		23 449.6	881.0	24 330.6	26 358.9
Cis in Asia		5 524.1	0.0	5 524.1	5 718.1
Kyrgyzstan	Jul/Jun	631.4	0.0	631.4	615.5
Tajikistan	Jul/Jun	1 184.3	0.0	1 184.3	1 107.0
Uzbekistan	Jul/Jun	3 708.4	0.0	3 708.4	3 995.6
Far East		9 266.5	71.0	9 337.5	11 008.8
Bangladesh	Jul/Jun	7 797.7	69.0	7 866.7	8 602.0
Democratic People's Republic of Korea	Nov/Oct	—*	—*	—*	1 063.0
Nepal	Jul/Jun	1 468.8	2.0	1 470.8	1 343.8
Near East		8 659.0	810.0	9 469.0	9 632.0
Afghanistan	Jul/Jun	2 212.0	100.0	2 312.0	2 732.0
Syrian Arab Republic	Jul/Jun	2 442.0	285.0	2 727.0	2 470.0
Yemen	Jan/Dec	4 005.0	425.0	4 430.0	4 430.0
CENTRAL AMERICA AND THE CARIBBEAN		1 600.4	25.1	1 625.5	1 491.5
Haiti	Jul/Jun	848.2	25.1	873.3	721.9
Nicaragua	Jul/Jun	752.2	0.0	752.2	769.6
TOTAL		52 448.3	2 073.7	54 522.0	58 565.6

Source: FAO

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

* Estimates not yet available.

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

(thousand tonnes)

	Marketing year	2020/21			2021/22
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		5 273.6	237.2	5 510.8	4 524.5
East Africa		1 540.0	220.0	1 760.0	1 630.0
Somalia	Aug/Jul	585.0	210.0	795.0	705.0
United Republic of Tanzania	Jun/May	955.0	10.0	965.0	925.0
Southern Africa		3 733.6	17.2	3 750.8	2 894.5
Lesotho	Apr/Mar	194.9	0.6	195.5	173.5
Madagascar	Apr/Mar	730.4	8.0	738.4	778.0
Malawi	Apr/Mar	211.5	1.5	213.0	193.0
Mozambique	Apr/Mar	1 802.9	1.0	1 803.9	1 560.0
Zimbabwe	Apr/Mar	793.9	6.1	800.0	190.0
ASIA		20 019.7	418.1	20 437.8	21 723.2
CIS in Asia		5 695.9	11.1	5 707.0	5 448.4
Kyrgyzstan	Jul/Jun	593.3	11.1	604.4	597.4
Tajikistan	Jul/Jun	1 107.0	0.0	1 107.0	1 179.0
Uzbekistan	Jul/Jun	3 995.6	0.0	3 995.6	3 672.0
Far East		9 931.8	2.0	9 933.8	10 370.8
Bangladesh	Jul/Jun	8 602.0	0.0	8 602.0	8 882.0
Nepal	Jul/Jun	1 329.8	2.0	1 331.8	1 488.8
Near East		4 392.0	405.0	4 797.0	5 904.0
Afghanistan	Jul/Jun	2 532.0	100.0	2 632.0	3 464.0
Syrian Arab Republic	Jul/Jun	1 860.0	305.0	2 165.0	2 440.0
CENTRAL AMERICA AND THE CARIBBEAN		1 461.3	15.1	1 476.4	1 550.0
Haiti	Jul/Jun	691.7	15.1	706.8	770.0
Nicaragua	Jul/Jun	769.6	0.0	769.6	780.0
TOTAL		26 754.6	670.4	27 425.0	27 797.7

Source: FAO

Note: 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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Enquiries may be directed to:

Global Information and Early Warning System on Food and Agriculture (GIEWS)
Markets and Trade - Economic and Social Development
GIEWS1@fao.org

Food and Agriculture Organization of the United Nations

Rome, Italy

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