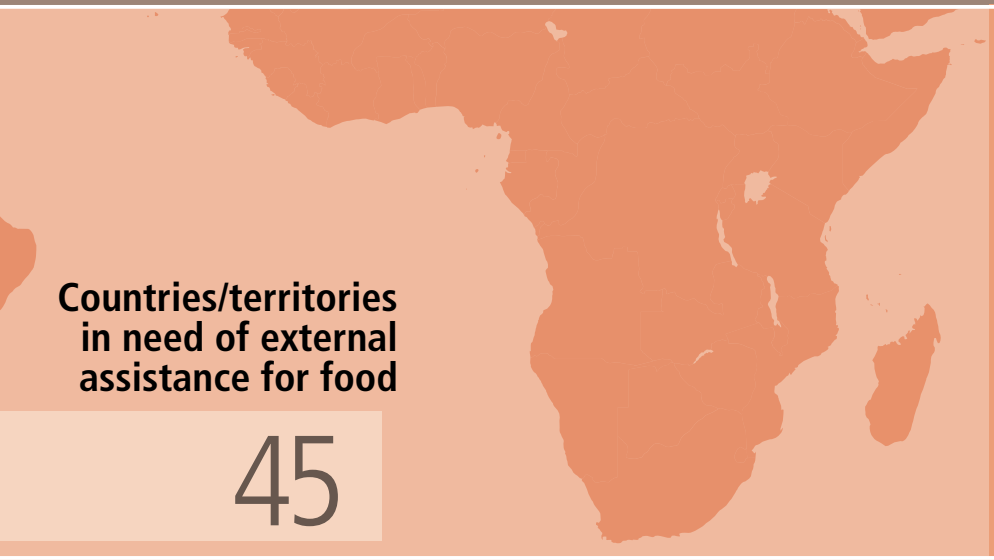
Food and Agriculture Organization of the United Nations

No. 1
MARCH 2024

ISSN 2707-2223

CROP PROSPECTS and FOOD SITUATION

Triannual Global Report



Countries/territories in need of external assistance for food

45

COUNTRIES/TERRITORIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that 45 countries, including 33 in Africa, nine in Asia, two in Latin America and the Caribbean, and one in Europe, are in need of external assistance for food. Conflicts in Near East Asia and in West and East Africa are driving alarmingly high levels of the most severe phase of acute food insecurity, while widespread dry weather conditions are expected to aggravate acute food insecurity in Southern Africa.

Asia	+1.3
Africa	-1.9
Central America and the Caribbean	-3.0
South America	-0.2
North America	+10.0
Europe	-1.5
Oceania	-31.2
World	**+1.1**

Global cereal production 2023 over 2022

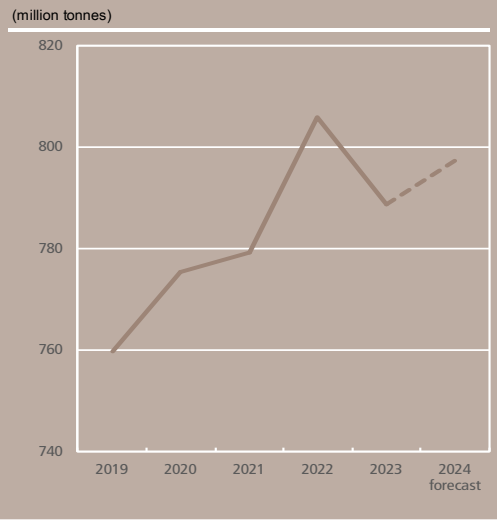
(yearly percentage change)

+1.1

Global wheat production 2024 over 2023

(yearly percentage change)

+1.1



REGIONAL HIGHLIGHTS

AFRICA Widespread rainfall shortages and high temperatures in North Africa and Southern Africa are anticipated to cause production declines in 2024, with crops to be harvested in the next months. A better rainfall performance in East Africa supported cereal production upturns in 2023, except in the Sudan where the conflict caused a sharp reduction. In West Africa, most countries registered above-average harvests owing to generally favourable weather conditions.

ASIA Large plantings and conducive weather conditions are underpinning favourable production prospects for the 2024 wheat output in Far East Asian countries. Mixed conditions prevailed in Near East Asian countries, and sustained rainfall is needed to improve the wheat production prospects in 2024, while early seasonal rainfall deficits are impairing potential yields in Central Asia.

LATIN AMERICA AND THE CARIBBEAN
In South America, areas of adverse weather conditions have curtailed 2024 maize production prospects in Brazil, although an above-average harvest is still expected. Maize outputs are set to recover in 2024 in Argentina and Uruguay following dry weather reduced 2023 harvests. In Central America and the Caribbean, worsening insecurity undermined agricultural production in Haiti; in Mexico, dry weather conditions resulted in a decline in 2024 wheat plantings.

Required citation:

FAO. 2024. *Crop Prospects and Food Situation* – Triannual Global Report No. 1, March 2024. Rome. https://doi.org/10.4060/cd0022en

ISSN 2707-2223 [Print]
ISSN 2707-2231 [Online]

ISBN 978-92-5-138629-3

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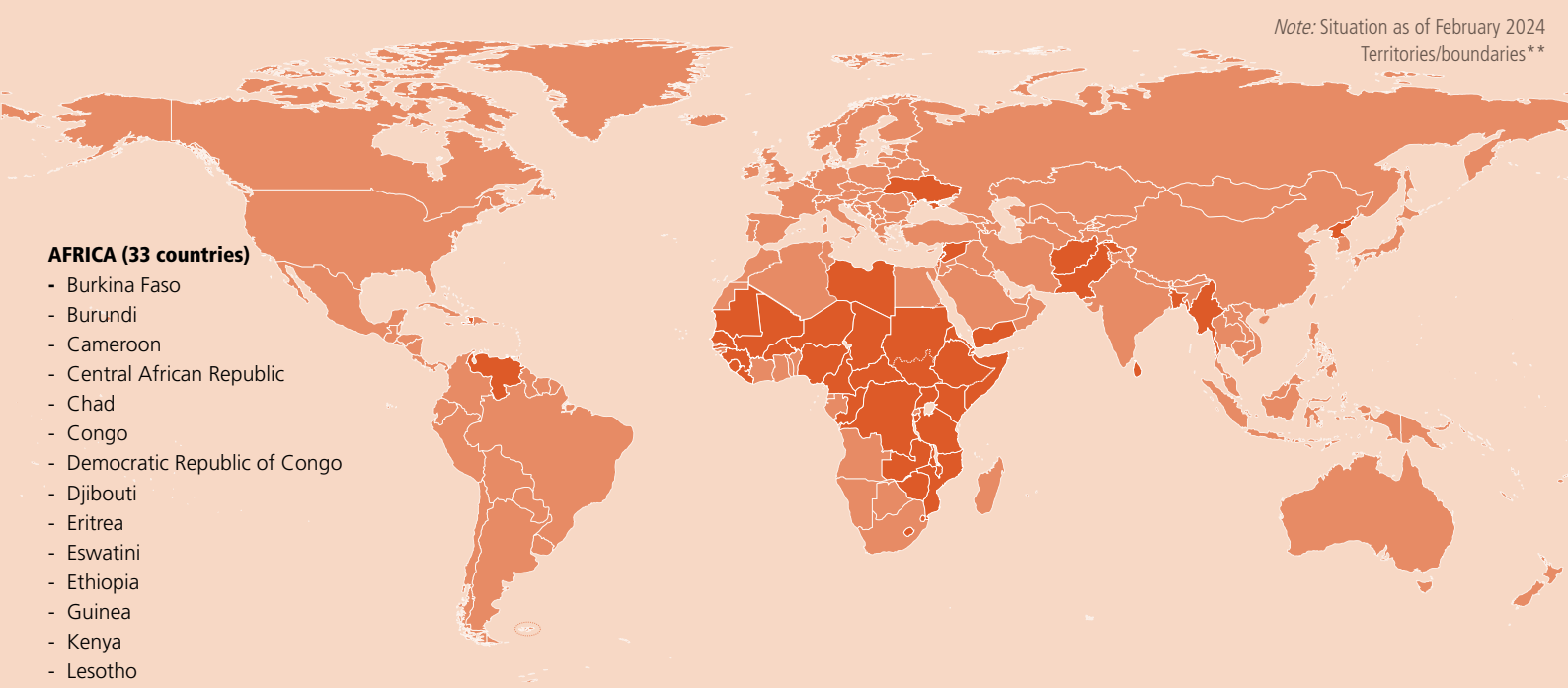


Note: Situation as of February 2024
Territories/boundaries**

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/territories)
- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Lebanon
- Myanmar
- Pakistan
- Palestine
- Syrian Arab Republic
- Yemen

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

EUROPE (1 country)
- Ukraine

** See Terminology (*page 7*)

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 1.* Cited 8 March 2024, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

AFRICA (33 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, high food prices, weather extremes

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3 [Crisis] and above) was projected to reach 2.5 million between April and August 2024, including about 521 000 people in IPC Phase 4 (Emergency). The situation reflects the impact of the conflict and civil insecurity, as well as the limited market access and rising food prices.
- As of December 2023, over 511 000 people were internally displaced as a result of civil insecurity and armed violence.

Kenya

Weather extremes

- About 1.5 million people were estimated to be acutely food insecure between October 2023 and January 2024, reflecting the lingering impact of a prolonged and severe drought between late 2020 and early 2023 that affected agricultural production, mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

Somalia

Drought conditions, civil insecurity

- About 4 million people are estimated to face severe acute food insecurity between January and March 2024, owing to consecutive poor rainy seasons between late 2020 and early 2023, as well as floods in late 2023 and an intensification of the conflict since August 2023.

Sudan

Conflict, displacements, high food prices

- About 17.7 million people, (almost 40 percent of the total population) were estimated to face severe acute food insecurity between October 2023 and February 2024, due to the conflict that broke out in mid-April 2023 that paralyzed economic activities, caused large scale displacements and sharply reduced the 2023 harvest.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes, high food prices

- About 1.23 million people are estimated to be facing (IPC Phase 3 [Crisis] and above) levels of acute food insecurity between January and March 2024. The main drivers are the lingering impact of floods in eastern and northern areas in early 2023 and high food prices due, in part, to the depreciation of the national currency.

Chad

Civil insecurity, high food prices, low cereal production

- According to the latest *Cadre Harmonisé* (CH) analysis, nearly 3 million people are projected to experience severe acute food insecurity during the June to August 2024 lean period, including approximately 294 000 people in CH Phase 4 (Emergency), as well as nearly 91 000 Sudanese refugees in the departments of Dar Tama (Wadi Fira) and Kimiti (Sila Region), who are projected to be severely acute food insecure (CH Phase 3 [Crisis] and above).
- Food security conditions are particularly concerning in eastern areas where the large majority of the 700 000 refugees and returnees that fled the Sudan since mid-April 2023 are located, reflecting increasing pressure on food stocks and local livelihoods, as well as disruptions in trade flows following the closure of the border with the Sudan, amid limited humanitarian assistance. Below-average cereal production in 2023 and high food prices are also constraining food access of vulnerable households across the country.
- As of February 2024, a total of 1.12 million refugees were residing in the country.

Democratic Republic of the Congo

Conflict

- According to the September 2023 IPC analysis, 23.4 million people are projected to experience acute food insecurity between January and June 2024. This is due to the intensification of the conflict in northeastern provinces, which, among other factors, has prevented the completion of harvests and will likely reduce food availability in the coming months.
- As of October 2023, a total of 6.04 million people in North Kivu, South Kivu and Ituri had been displaced due to the conflict.

Djibouti

Unfavourable weather, high food prices

- About 250 000 people were estimated to have faced acute food insecurity (IPC Phase 3 [Crisis] and above) between March and June 2023, mainly due to the lingering impact of a prolonged and severe drought between late 2020 and early 2023, as well as high food prices.

Eritrea

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

Ethiopia

Drought in southern areas, conflict in Tigray Region, high food prices

- According to the 2024 Humanitarian Response Plan, about 15.8 million people are officially estimated to be facing severe acute food insecurity, mainly due to weather extremes, conflict in northern areas and high food prices.

Malawi

Weather extremes, high food prices

- The latest IPC analysis puts the number people facing acute food insecurity (IPC Phase 3 [Crisis] and above) at 4.4 million between October 2023 and March 2024, 15 percent more than the corresponding period in 2022/23.
- Dry and hot conditions are impacting central and southern districts, weighing on 2024 agricultural production prospects, and along with persistently high food prices acute food insecurity conditions are foreseen to remain stressed in 2024.

Mauritania

High food prices

- According to the latest CH analysis, about 365 000 people are projected to be in need of humanitarian assistance during the June to August 2024 lean period, including about 7 100 people in CH Phase 4 (Emergency). This would be an improvement compared to the previous year, mostly due to an increase in cereal output in 2023.
- Elevated food prices continued to constrain food access of vulnerable households.
- As of January 2024, the country was hosting nearly 123 000 refugees and asylum seekers, mostly from Mali.

Niger

Insecurity, political instability, high food prices, localized crop production shortfalls

- According to the November 2023 CH analysis, over 3.23 million people are projected to be severely acute food insecure during the June to August 2024 lean season, including about 95 000 people in CH Phase 4 (Emergency).
- Food access remains significantly constrained in areas affected by insecurity, including Tillaberi, Tahoua, Diffa and Maradi regions, while sanctions following the military takeover triggered abrupt increases in food prices and exacerbated food insecurity among vulnerable households across the country.
- About 170 000 people were affected by floods during the 2023 rainy season.
- As of January 2024, the country was hosting over 306 000 refugees and asylum seekers, mainly from Nigeria and Mali.

Nigeria

Conflict in northern areas, macroeconomic crisis, high food prices

- About 26.46 million people are projected to face severe acute food insecurity during the June to August 2024 lean season, including over 1 million people in CH Phase 4 (Emergency), which is above the 24.86 million people estimated in 2023. The increase, however, partially reflects an expanded coverage of the CH analysis.
- Acute food insecurity is mostly the result of escalating civil insecurity and conflicts in northern states, which, as well as disrupting agricultural activities and markets, led to the displacement of about 3.49 million people as of June 2023.
- High inflation rates, driven by a steep loss of value of the naira, are curtailing vulnerable households' economic access to food.
- As of December 2023, over 86 000 refugees and asylum seekers, mostly from Cameroon, were residing in the country.

South Sudan

Economic downturn, floods, civil insecurity

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, owing to rampant inflation, insufficient food supplies, the lingering impact of consecutive years with widespread floods and episodes of intercommunal violence. About 5.78 million people, almost half of the total population, are expected to face severe acute food insecurity between December 2023 and March 2024.

- Particular concern exists for about 11 000 people in the Greater Pibor Administrative Area and 14 000 returnees from the conflict-affected Sudan facing IPC Phase 5 (Catastrophe) levels of acute food insecurity.

Zimbabwe

High food prices, localized shortfalls in production

- An estimated 3.5 million people are projected to be in need of humanitarian assistance up until at least March 2024.
- Prevailing high food prices and reduced incomes, owing to the effects of an economic downturn, are key factors underpinning the high levels of acute food insecurity. Expectations of a reduced cereal output in 2024, on account of unfavourable weather conditions, is likely to be a serious aggravating stressor on food insecurity this year.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Conflict

- According to the latest CH analysis, nearly 3 million people are projected to face severe acute food insecurity during the June to August 2024 lean season, including over 425 000 people in CH Phase 4 (Emergency).
- Acute food insecurity is primarily underpinned by worsening conflict and, in particular, by the use of siege tactics by non-state armed groups. Insecurity is hampering agricultural activities and driving up food prices, while humanitarian access constraints are very high. As of March 2023, civil insecurity resulted in the displacement of about 2.06 million people.
- As of January 2024, nearly 39 000 refugees and asylum seekers, mostly from Mali, were residing in the country.

Cameroon

Civil insecurity, high food prices

- According to the October 2023 CH analysis, about 2.5 million people are estimated to be acutely food insecure (CH Phase 3 [Crisis] and above), between June and August 2024, as a result of the effects of the conflict, sociopolitical unrest and high food prices, as well as floods that caused population displacements and agricultural damage, and losses.
- As of June 2023, the number of internally displaced persons (IDPs) was more than 1.1 million due to attacks by non-state armed groups (NSAGs) in Far North Region.

Congo

Refugee influx, floods

- As of end-2022, nearly 30 000 refugees from the Central African Republic and approximately 26 000 from the Democratic Republic of the Congo were residing in the country, mostly in Likouala and Plateaux departments. Host communities face pre-existing food shortages and limited livelihood opportunities, and refugees' food security relies heavily on ongoing humanitarian assistance.
- Flooding in early 2023 affected about 165 000 people, located in the departments of Cuvette, Likouala, Plateaux and Sangha.

Eswatini

High food prices, economic downturn

- The latest IPC analysis points to a 9 percent year-on-year increase in the number of people facing acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2023 and March 2024, projected at 283 000.
- Food insecurity is driven by high food prices and a slowdown in economic growth, which has curbed households' income-earning opportunities.

Guinea

High food prices

- Over 675 000 people are projected to be severely acute food insecure during the June to August 2024 lean season, including approximately 53 000 people in CH Phase 4 (Emergency), an improvement compared to 2023 when nearly 710 000 people were estimated to face severe acute food insecurity. Acute food insecurity is mainly driven by elevated food prices.
- As of January 2024, about 2 200 refugees and asylum seekers, mostly from Sierra Leone, were residing in the country.

Lesotho

High food prices, economic downturn

- According to the latest IPC analysis, an estimated 325 000 people are projected to face IPC Phase 3 (Crisis) levels of acute food insecurity between October 2023 and March 2024, representing a small increase compared to the previous year.
- Food insecurity conditions are primarily underpinned by high food prices and a slow economic recovery that is impinging on households' economic capacity to access food.

Liberia

High food prices, macroeconomic challenges

- According to the latest CH analysis, over 531 000 people were projected to face severe acute food insecurity during the June to August 2023 lean season period, including approximately 21 500 people in CH Phase 4 (Emergency). Acute food insecurity is associated with high food prices.
- As of January 2024, the country was hosting about 1 800 refugees and asylum seekers.

Libya

Civil insecurity, economic and political instability, high food prices, dam destruction

- A strong storm struck the country in September 2023, causing destruction of two dams and flooding, worsening the acute food insecurity situation. The 2024 Global Humanitarian Overview reports a reduction in the number of acute food insecurity to 250 000 people in 2024.

Madagascar

Weather extremes, slow economic recovery

- Between January and March 2024, a projected 1.7 million people are expected to face IPC Phase 3 (Crisis) and above emergency levels of acute food insecurity in southern and southeastern areas, marking a small improvement compared to the previous year.

Mali

Conflict

- According to the latest CH analysis, about 1.37 million people are projected to face severe acute food insecurity during the June to August 2024 lean season, including nearly 55 000 people in CH Phase 4 (Emergency). This number is higher compared to the previous year, but no populations are projected to be in CH Phase 5 (Catastrophe), and the number of people in CH Phase 4 (Emergency) is expected to decline.

- Food insecurity conditions are primarily underpinned by the impact of the conflict in northern and central areas, which continues to disrupt livelihoods and markets, and has caused the displacement of nearly 355 000 people, as of October 2023, while humanitarian access constraints are very high.
- As of January 2024, the country was hosting approximately 67 000 refugees and asylum seekers, mostly from Burkina Faso, the Niger and Mauritania.

Mozambique

Insecurity in northern areas, reduced localized harvests

- According to the latest IPC analysis, an estimated 3.3 million people are classified in IPC Phase 3 (Crisis) and above between October 2023 and March 2024. Insecurity in the northern province of Cabo Delgado underpins the severest levels of acute food insecurity.
- Unfavourable weather conditions in parts of the country during the 2023/24 cropping season could result in reduced localized agricultural outputs in 2024 and aggravate acute food insecurity, whilst persisting attacks by NSAGs in Cabo Delgado continue to be a severe stressor.

Namibia

Localized shortfalls in cereal production, high food prices

- An estimated 695 000 people are projected to face acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2023 and March 2024, a significant increase over last year's figures.
- Weather and price shocks, as well as subdued economic growth, are key factors driving the high levels of acute food insecurity.

Senegal

Macroeconomic challenges

- According to the latest CH analysis, about 727 000 people are projected to be severely acutely food insecure during the June to August 2024 lean season, including over 43 500 people in CH Phase 4 (Emergency). This marks a significant improvement compared to the previous year, when about 1.26 million people were estimated to be in need of humanitarian assistance, which is mostly due to an above-average cereal production in 2023.
- The main drivers of acute food insecurity are macroeconomic challenges.
- As of January 2024, about 12 700 refugees and asylum seekers, mostly from Mauritania, were residing in the country.

Sierra Leone

High food prices, macroeconomic challenges

- According to the latest CH analysis, about 1.46 million people are projected to be in need of humanitarian assistance during the June to August 2024 lean season period. This would be a deterioration compared to the same period in 2023, when about 1.18 million people were estimated to be severely acute food insecure.
- Acute food insecurity is underpinned by high food prices, in part driven by a weak national currency, and low purchasing power of vulnerable households.

Uganda

Weather extremes, insecurity, high food prices

- The latest IPC analysis, conducted in refugee hosting districts, estimates that about 963 000 people are facing acute food insecurity (IPC Phase 3 [Crisis] and above) between February and June 2024. These conditions reflect the adverse impact of weather shocks on crop production, conflict between refugees and the host population, and high food prices.
- The number of refugees and asylum seekers, mainly hosted in camps and rely on humanitarian assistance, was estimated in early February 2024 at 1.62 million, including about 927 000 from South Sudan and about 527 000 from the Democratic Republic of the Congo.

United Republic of Tanzania

Localized shortfalls in staple food production, high food prices

- According to the latest IPC analysis, conducted in 21 districts of mainland Tanzania where, according to official estimates crop production in 2023 was below-average, an estimated 900 000 people are facing severe acute food insecurity between November 2023 and April 2024.
- The main drivers of crop production shortfalls are adverse weather conditions and outbreaks of pests and diseases.

Zambia

High food prices

- Just over 2 million people are classified in IPC Phase 3 (Crisis) and above between October 2023 and March 2024. High food prices, including record high prices of maize and localized shortfalls in cereal production, are key factors driving the high levels of acute food insecurity.
- Dry weather conditions are affecting large swathes of the country in 2024 and, if cereal production declines, this could intensify acute food insecurity in the affected areas.

ASIA (9 COUNTRIES/TERRITORIES)

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, weak economic growth

- The food security situation is expected to remain fragile, amid persistent weak economic growth.

Lebanon

Economic crisis

- According to the IPC analysis, between October 2023 and March 2024, about 1.05 million Lebanese, Syrian refugees, Palestine refugees from Lebanon and the Syrian Arab Republic are classified in IPC Phase 3 (Crisis) and above, corresponding to 19 percent of the analysed population. Between April and September 2024, about 1.14 million people are expected to face high levels of food insecurity and are likely to be in IPC Phase 3 (Crisis) or above, corresponding to 21 percent of the analysed population.

Palestine

Conflict

- According to the IPC analysis, as of 7 February 2024, the entire population in Gaza Strip (2.2 million people) faced high levels of acute food insecurity (IPC Phase 3 [Crisis] or above). Over 50 percent (1.17 million people) were classified in IPC Phase 4 (Emergency).

At least one out of four people (more than 500 000 people) face IPC Phase 5 (Catastrophe) conditions.

Syrian Arab Republic

Economic crisis, lingering conflict

- According to the 2024 Humanitarian Needs Overview (HNO), at least 12.9 million people, more than half of the population, are estimated to be in need of food assistance in 2024, mostly on account of economic challenges and limited livelihood opportunities.

Yemen

Conflict, floods, high food and fuel prices

- Nearly 17 million people, or over 53 percent of the population, were classified in IPC Phase 3 (Crisis) and above between October and December 2022. Of primary concern are the 6.1 million people classified in IPC Phase 4 (Emergency) and the 4.3 million people who are internally displaced as a result of the conflict.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict, population displacement, economic slowdown

- The latest IPC analysis estimated the number of people in IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) at 15.8 million, 36 percent of the population analysed, between November 2023 and March 2024.

Bangladesh

Economic constraints, refugee influx

- Food insecurity is expected to remain fragile, given persisting economic constraints.
- About 1 million Rohingya refugees from Myanmar reside in the country, mainly in Cox's Bazar District.

Myanmar

Conflict, economic constraints, high prices of main food staple, reduction of 2023 agricultural output

- The protracted political crisis is compromising the fragile conditions of vulnerable households and Rohingya IDPs. According to the latest figures (January 2024) from the United Nations High Commissioner for Refugees (UNHCR), the number of IDPs is estimated at about 2.6 million. Most of the IDPs are located in Rakhine, Chin, Kachin, Kayin and Shan states.
- Rice production in 2023, the country's main staple food, is forecast below the five-year average for the second consecutive year, mostly reflecting constraints on farmers' access to agricultural inputs and unfavourable weather conditions.
- Domestic prices of rice *emata*, the most consumed variety in the country, were at record levels as of January 2024, constraining access to a key staple food.

Pakistan

Weather extremes, economic constraints, high prices of the main food staple

- According to the latest IPC analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between November 2023 and January 2024 was projected at 11.8 million, due to the lingering effects of devastating flood impacts in 2022 and high domestic food prices.
- Prices of wheat flour, the country's main staple, were at near-record levels in most markets in January 2024.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Haiti

High food prices, natural disasters, civil insecurity

- About 4.4 million people (45 percent of the analysed population) are estimated to face severe acute food insecurity and are in need of urgent food assistance between March and June 2024. The high levels of food insecurity are the result of a sustained economic downturn, reducing domestic food production, elevated food prices, fuel shortages and frequent natural disasters. The situation is exacerbated by worsening civil insecurity, which has limited access to essential services and caused population displacements.

Venezuela (Bolivarian Republic of)

Economic crisis

- About 2 million people are estimated to be in need of food assistance in 2024, unchanged from a year earlier, according to Humanitarian Response Plan. In 2023, the annual inflation rate remained high at nearly 190 percent, limiting food access for the most vulnerable households. Despite some economic recovery since 2021, outflows of refugees and migrants continued in 2023 due to the lingering effects of the severe and prolonged macroeconomic crisis between 2014 and 2020.

NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

WIDESPREAD LACK OF ACCESS

Ukraine

Conflict

- The country continues to be a significant supplier of food commodities for the world. However, according to the 2023 HNO, at least 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2024 due to the war, including over 11 million in need of food security and livelihood interventions.

Terminology

Countries/territories 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/territories 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/territories 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/territory.

Countries/territories with **severe localized food insecurity** due to the influx of refugees, a concentration of internally displaced persons, or areas with combinations of crop failure and deep poverty.

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

Africa (page 12)
Asia (page 21)
Latin American and the Caribbean (page 28)

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

GLOBAL CEREAL OVERVIEW

Cereal supply and demand overview

Global cereal supplies in 2023/24 remain comfortable; early production prospects of wheat in 2024 favourable

FAO's new forecast for world cereal **production** in 2023 has been raised marginally and now stands at 2 840 million tonnes, marking a 1.1 percent (30.4 million tonnes) rise compared to the previous year.[1] This growth is primarily the result of a substantial increase in the forecast for world maize output (up 5.3 percent), driven by Brazil, China (mainland) and the United States of America, which more than offsets a lower expected global wheat output (down 2.3 percent). As for rice, since February, FAO has upgraded its 2022/23 and 2023/24 production figures for India to take into account official data indicating large extensions planted to the summer crop cycle. This revision overshadows minor downward adjustments to production figures for other countries, particularly Colombia and Myanmar. As a result of these changes, global rice production is now expected to reach 526.2 million tonnes (milled basis) in 2023/24, up 0.4 percent from the revised 2022/23 level.

At 2 823 million tonnes, the forecast for global cereal **utilization** in 2023/24 stands at 1.4 million tonnes higher than forecast In February and 31.3 million tonnes (1.1 percent) above the 2022/23 level. Mostly stemming from higher feed use of maize, especially in Algeria and India, the forecast for 2023/24 global coarse grain utilization has been raised by 0.9 million tonnes to 1 506 million tonnes, representing a 1.2 percent increase from 2022/23. Despite a 1-million-tonne cut to the forecast this month, world wheat utilization in 2023/24 is still set to increase by 1.8 percent year-on-year to 793.3 million tonnes, supported mostly by anticipated growth in the feed use of wheat. World rice utilization is now forecast at 523.7 million tonnes in 2023/24, 1.5 million tonnes more than previously estimated, largely due to upgrades to rice uses in India since 2022/23. Despite this upward revision, world rice total utilization will likely register little to negative growth in 2023/24.

FAO's forecast for global cereal **stocks** ending in 2024 has also been raised since the previous report in February by 1.5 million tonnes to 896.9 million tonnes, representing a 24-million-tonne (2.8 percent) increase above their opening levels. Consequently, the global cereal stocks-to-use ratio should be expected to increase from 30.9 percent in 2022/23 to 31.1 percent in 2023/24, pointing to a continuing comfortable global supply situation. This month's upward revision in the forecast for global cereal stocks is due to further upgrades to global coarse grain inventories (up 2.4 million tonnes month-on-month), which were mostly boosted by higher estimates for maize stocks in China (mainland). Following this revision, global coarse grain stocks are expected to reach 379.3 million tonnes, up 25.9 million tonnes (7.3 percent) from their opening levels. By contrast, global wheat stocks, pegged at 318.9 million tonnes, were lowered marginally (0.8 million tonnes) since last month and are currently expected to decline by 4.3 million tonnes (1.3 percent) below their opening levels. World rice stocks at the close of the 2023/24 marketing years are forecast at 198.7 million tonnes, essentially unchanged from February expectations and implying a 1.2 percent year-to-year expansion to an all-time high. Rice stocks are foreseen to accumulate in exporting countries (mostly India), while those held by importing countries are anticipated to fall for the third successive season.

Table 1. World cereal production
(million tonnes)

	2021	2022	2023 est.	Change: 2023 over 2022 (%)
Asia	1 236.9	1 260.9	1 277.0	+1.3
Far East	1 151.0	1 159.6	1 172.1	+1.1
Near East	54.9	64.4	72.0	+11.9
CIS in Asia	31.0	36.9	32.8	-11.1
Africa	203.3	201.2	197.4	-1.9
North Africa	36.5	31.5	31.0	-1.5
West Africa	63.5	69.5	67.6	-2.7
Central Africa	7.1	7.2	7.2	+0.2
East Africa	54.9	55.9	53.1	-5.0
Southern Africa	41.2	37.2	38.5	+3.5
Central America and the Caribbean	43.0	42.5	41.3	-3.0
South America	228.6	246.6	246.1	-0.2
North America	495.2	471.7	518.7	+10.0
Europe	548.8	525.0	517.1	-1.5
European Union[1]	296.9	270.5	272.8	+0.8
CIS in Europe	128.7	161.5	146.8	-9.1
Oceania	55.9	61.1	42.0	-31.2
World	2 811.7	2 809.1	2 839.5	+1.1
- wheat	779.2	805.6	787.3	-2.3
- coarse grains	1 506.2	1 479.5	1 526.0	+3.1
- rice (milled)	526.2	524.0	526.2	+0.4

Notes: Includes rice in milled terms. Totals and percentage changes are 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 monthly FAO World Food Situation update.

Pegged at 483 million tonnes, up 3.1 million tonnes from last month, the forecast for world cereals **trade** in 2023/24 points to a 6.4 million tonne (1.3 percent) increase above the 2022/23 level, resting exclusively on an anticipated rise in global coarse grain trade. Following a 3.1-million-tonne upward revision this month, global trade in coarse grains is forecast to expand by 10.3 million tonnes (4.6 percent) in 2023/24 (July/June) to 234.1 million tonnes. This month's upgrade is driven by greater anticipated global maize trade, reflecting improved maize export prospects for Ukraine and stronger demand from China (mainland). Nearly unchanged this month at 197.5 million tonnes, world wheat trade in 2023/24 (July/June) is still likely to contract by 2.4 million tonnes (1.2 percent) from the previous season's level. International trade in rice is forecast at 51.4 million tonnes in 2024 (January–December), little changed from February expectations and implying a second successive annual trade contraction.

Early outlook for 2024 crops

Looking ahead to 2024, FAO's preliminary forecast for global wheat production is pegged at 797 million tonnes, representing a 1 percent increase over the 2023 outturn but still below the record high reached in 2022. In the United States of America, lower prices have elicited a 6 percent year-on-year decline in winter wheat plantings. Nevertheless, ample precipitation since the last quarter of 2023, following two consecutive years of widespread drought, has raised both yield prospects and expectations that the harvested area could exceed the level of 2023. The country's total wheat production in 2024 is forecast at 51.5 million tonnes, above the recent five-year average and the 2023 output. In Canada, similarly, reflecting softer prices, official projections indicate a 2 percent contraction in wheat plantings. However, with more conducive weather conditions forecast this year, after a weather-stricken 2023 harvest, good yield prospects are underlying expectations of an upturn in wheat production to 33 million tonnes in 2024. Conversely, in Europe, heavy rains disrupted and delayed sowing of the winter wheat crop, particularly in key producing countries France and Germany, with the total wheat area forecast to decline moderately in 2024. Combined with recent cold snaps and rainfall deficits that affected parts of the bloc, wheat production in the European Union is expected to fall slightly in 2024 to around 133 million tonnes. Less-than-ideal weather conditions were also present in the United Kingdom of Great Britain and Northern Ireland at sowing time, engendering a cut in the wheat area, which is set to cause a small decrease in production in 2024. Wheat planted area in Ukraine is estimated to have fallen further in 2024, as the war continues to obstruct access to fields and impose severe financial constraints on farmers, limiting the profitability of wheat production. In the Russian Federation, generally favourable weather conditions, which are forecast to continue for the rest of the season, are propping up expectations of a small increase in the country's winter wheat production in 2024. In Asia, a bumper wheat outturn is forecast in India in 2024, reflecting adequate supplies of irrigation water, conducive weather conditions and remunerative crop prices that induced increased plantings. In Pakistan, wheat production is foreseen to increase to 28.3 million tonnes, amid overall conducive weather conditions. In China (mainland), driven by strong domestic demand and an increase in the minimum purchase prices that supported large plantings, production is forecast at a slightly above-average level of 136.3 million tonnes. In Near East Asian countries, amid mostly beneficial weather conditions, near-average wheat outputs are forecast in Türkiye and the Islamic Republic of Iran, both significant producers. In North Africa, widespread rainfall deficits for a second consecutive year are impairing 2024 wheat yield prospects in Algeria and Tunisia, as well as in Morocco.

South of the Equator, the 2024 main season maize crop is being planted in Brazil and, due to lower crop prices and a late soybean harvest that delayed sowing operations, the maize area is forecast to fall compared to the previous year. Total maize production in Brazil is seen declining from the record high of 2023 but still expected to exceed the past five-year average. Maize production in Argentina is expected to recover following the drought-affected harvest in 2023, based on conducive weather conditions. In South Africa, recent rainfall deficits have sharply dented yield prospects, and the country's 2024 maize output is forecast to drop to a near-average level, below earlier expectations. Dry weather conditions are affecting neighbouring countries and have sharply curtailed 2024 maize production prospects.

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

	5-year average	2022	2023 est.	2024 f'cast
European Union[1]	137.7	134.4	134.0	133.0
China (mainland)	135.8	137.7	136.6	136.3
India	107.9	107.7	110.6	112.4
Russian Federation	86.7	104.2	92.8	93.6
United States of America	48.3	44.9	49.3	51.5
Canada	31.4	34.3	32.0	33.3
Australia	29.7	40.5	25.5	34.1
Ukraine	25.7	20.7	22.5	20.2
Pakistan	26.3	26.2	28.2	28.3
Türkiye	19.8	19.8	22.0	20.0
Argentina	17.5	12.6	15.5	16.5
Iran (Islamic Republic of)	13.0	13.0	13.5	13.0
Kazakhstan	13.2	16.4	12.1	13.0
United Kingdom of Great Britain and Northern Ireland	13.9	14.0	15.7	13.2
Egypt	9.4	9.8	9.7	9.8
Other countries	65.5	69.5	68.9	69.1
World	781.7	805.8	788.6	797.3

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

Mixed weather conditions and conflicts temper 2024 cereal production prospects

Among the low-income food-deficit countries (LIFDCs),[2] harvesting of the 2024 cereal crop is expected to start from April in *Far East Asia* and *Southern Africa*, while plantings will soon begin in *Central Africa*, *East Africa* and *West Africa*.

In *Southern Africa*, cereal production prospects for 2024 crops have taken a sharp downturn since January, driven by an extended period of low rainfall amounts and higher-than-average temperatures. Weather conditions are not expected to improve significantly in the coming months and 2024 cereal outputs in Malawi, Mozambique and Zimbabwe are expected to fall to average or potentially below-average levels. Conditions in Madagascar appear somewhat more favourable, where cyclone activity was comparatively minimal. In *East Africa*, following multiple seasons of dry weather conditions, rainfall amounts were more abundant in the second half of 2023 and good rains are expected to continue in 2024, boding well for crop yields. In the Sudan, widespread insecurity is expected to continue to disrupt agricultural activities in 2024, which is weighing on the production outlook.

In *West Africa*, sowing of the 2024 cereal crops will begin in March. Weather forecasts point to a high probability of above-average rainfall amounts in Sahelian countries, but a stronger possibility of below-normal rainfall in coastal countries. Persisting conflicts in several countries are expected to continue to hinder farmers' access to inputs and fields.

In *Far East Asian* and *Near East Asian* countries, generally favourable weather conditions are fostering overall good production prospects in 2024, but persisting difficult socioeconomic circumstances in Afghanistan and the Syrian Arab Republic continue to constrain farmers' capacity to access sufficient inputs. In *Central Asian* countries, reduced rainfall amounts at the start of the season and forecasts indicating a continuation of low precipitation in the spring months are denting production prospects of the 2024 winter wheat crop.

Table 3. Basic facts of low-income food-deficit countries (LIFDCs) cereal situation
(million tonnes, rice in milled basis)

	5-year average	2022/23 est.	2023/24 f'cast	Change: 2023/24 over 2022/23 (%)
Cereal production[I]	*140.5*	*140.9*	*141.4*	*+0.3*
Utilization	*182.5*	*188.0*	*189.8*	*+1.0*
Food use	*139.2*	*145.8*	*149.9*	*+2.9*
Per caput cereal food use (kg per year)	*142.6*	*142.0*	*142.4*	*+0.3*
End of season stocks[II]	*47.3*	*47.2*	*45.3*	*-4.1*

[I] Data refer to calendar year of the first year shown.

[II] 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	2022	2023 est.	Change: 2023 over 2022 (%)
Africa (34 countries)	*108.4*	*110.0*	*108.2*	*-1.7*
East Africa	*56.7*	*55.9*	*53.1*	*-5.0*
Southern Africa	*11.5*	*11.8*	*12.4*	*+5.7*
West Africa	*33.2*	*35.2*	*35.5*	*+0.7*
Central Africa	*7.0*	*7.1*	*7.1*	*+0.2*
Asia (8 countries)	*31.1*	*29.8*	*32.2*	*+7.8*
CIS in Asia	*10.0*	*10.6*	*10.5*	*-1.1*
Far East	*17.9*	*17.3*	*17.9*	*+3.2*
Near East	*3.2*	*1.9*	*3.8*	*+98.4*
Central America and the Caribbean (2 countries)	*1.0*	*1.0*	*1.0*	*-0.6*
LIFDCs (44 countries)	*140.5*	*140.9*	*141.4*	*+0.3*

Notes: Includes rice in milled terms. Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

Cereal production pegged to remain unchanged in 2023

FAO's forecast for aggregate cereal production, including rice in milled terms, of LIFDCs in 2023 stands at 141.4 million tonnes, 3 percent above the five-year average and on par with the outturn in 2023.

[2] Please see https://www.fao.org/countryprofiles/lifdc/en/ for further details.

At the aggregate level, production growth in 2023 was stymied by significantly reduced cereal outturn in the Sudan, on account of the conflict that both physically disrupted agricultural activities, and sent prices of agricultural inputs soaring, reducing accessibility and use. Elsewhere in *East Africa*, a return to near-normal rainfall conditions, after consecutive poor rainy seasons, led to an upturn in harvests in most countries. In *Southern Africa* and *West Africa*, cereal harvests in 2023 are estimated at generally above-average levels, underpinned by beneficial weather conditions, though the conflicts and civil insecurity in several *West African* countries continued to contain production growth. Aggregate production in *Near East Asian* countries increased in 2023 and an overall average output was estimated in *Far East Asian* countries. In *Central America*, weather shocks and civil insecurity in Haiti are two key reasons underlying estimates of a below-average output in 2023.

Import growth forecast for East Africa in 2023/24

The total cereal import requirement for LIFDCs is forecast at 49.4 million tonnes in the 2023/24 marketing year, more than 3 million tonnes, 7 percent higher than the five-average. The bulk of the growth in import needs is linked with *East African* countries, notably in the Sudan, and in Kenya where three years of below-average harvests have tightened domestic supplies. Elsewhere, there have not been significant changes in import needs compared to average levels.

Although international benchmark cereal prices have fallen in 2023 and early 2024, except for rice, weak currencies in several countries are limiting the pass-through effects of declining global prices.

Table 5. Cereal imports of LIFDCs

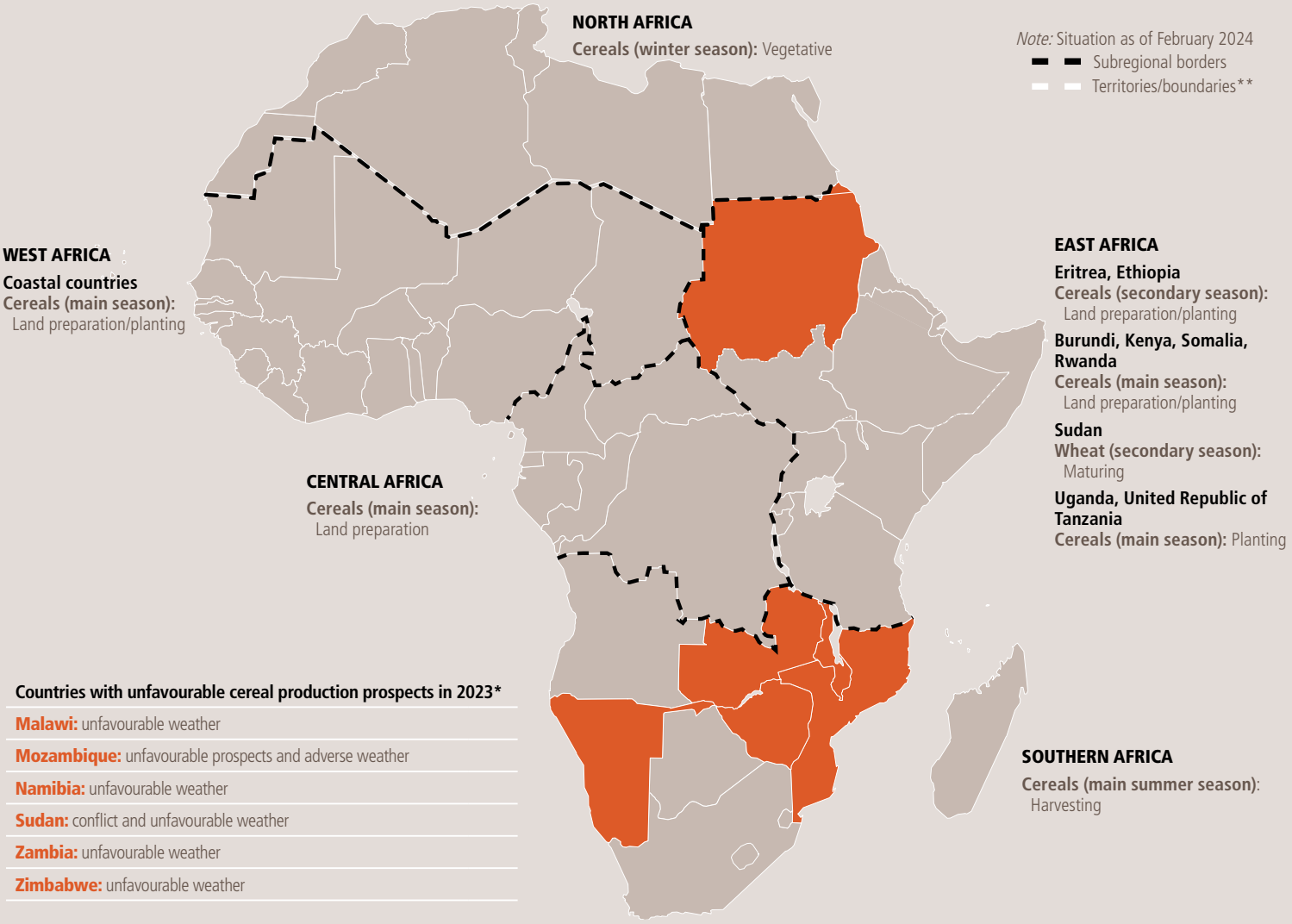
(thousand tonnes)

	2021/22 or 2022	2022/23 or 2023	2023/24 or 2024
	Actual imports	Import estimate	Import requirement[1]
Africa (34 countries)	*29 710*	*29 052*	*29 566*
East Africa	*14 548*	*13 901*	*15 566*
Southern Africa	*3 092*	*3 311*	*3 184*
West Africa	*9 144*	*9 167*	*8 208*
Central Africa	*2 926*	*2 674*	*2 608*
Asia (8 countries)	*17 901*	*18 133*	*17 530*
Central Asia	*5 053*	*5 867*	*5 276*
Far East	*5 391*	*4 801*	*4 849*
Near East	*7 457*	*7 465*	*7 405*
Central America and the Caribbean (2 countries)	*1 447*	*1 435*	*1 472*
LIFDCs (44 countries)	*49 058*	*48 620*	*48 568*

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



Countries with unfavourable cereal production prospects in 2023*

- **Malawi:** unfavourable weather
- **Mozambique:** unfavourable prospects and adverse weather
- **Namibia:** unfavourable weather
- **Sudan:** conflict and unfavourable weather
- **Zambia:** unfavourable weather
- **Zimbabwe:** unfavourable weather

*/** See Terminology (*page 7*).
Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

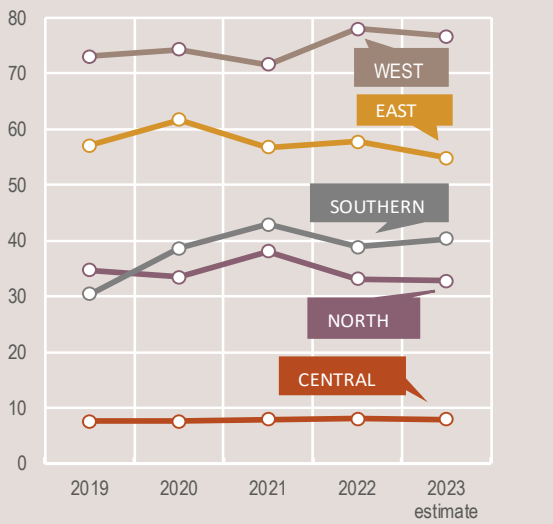
Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 1.* Cited 8 March 2024, modified to comply with the United Nations map No. 4045 Rev. 8, 2018.

Production Overview

Total cereal production in Africa in 2023 is estimated at 212.5 million tonnes, including rice in paddy terms, down moderately compared to the outturn in 2022 and only slightly above the five-year average. The bulk of the year-on-year production decline is attributed to lower outputs in East Africa, almost entirely linked to a poor harvest in conflict-affected Sudan, and North Africa, reflecting the damaging impact of low rainfall amounts. In West Africa, most countries registered above-average harvests in 2023, but conflicts constrained a more pronounced production growth, while in Central Africa production remained broadly unchanged compared to the average.

Harvesting of the 2024 cereal crops is expected to begin from April in Southern Africa, where widespread and prolonged rainfall deficits have sharply curtailed production prospects. In North Africa, dry weather conditions are also impairing yield expectations for 2024 crops, which follows poor harvests in 2023. Planting of the 2024 crops in West Africa, East Africa and Central Africa will start from April.

Cereal production
(million tonnes)



NORTH AFRICA

Dry weather conditions worsen 2024 crop production prospects

Planting of the 2024 winter cereals for harvest from May was completed in January 2024. Cereal production in Morocco, Algeria and Tunisia is almost entirely rainfed and output levels are heavily influenced by changes in rainfall amounts and temporal distributions. Cumulative rainfall amounts at the end of February 2024 were below average in **Morocco**, and along with above-average temperatures, have caused widespread drought conditions that are curbing wheat production prospects. Since the beginning of the winter cropping season, precipitation amounts have also been well below average in southern and western areas of **Algeria**. In **Tunisia**, irregular and below-average rainfalls characterized the sowing phase of winter crops, while dry weather conditions affected western areas of **Libya**. More rains are needed in the coming months to replenish soil moisture and improve production prospects. In **Egypt**, most cereal crops are produced under irrigation, resulting in stable yields with year-on-year production variations largely attributable to changes in the planted area and, over the longer term, introduction of improved seeds.

Below-average cereal production in 2023

The subregion's aggregate cereal production in 2023 is estimated at 32.8 million tonnes including 16.7 million tonnes of wheat. Cereal output remained almost unchanged compared to 2022 and about 11.19 percent below the five-year average. The reduced outturn reflects the impact of widespread and severe drought conditions that curtailed crop yields. Cereal production in **Tunisia** is estimated at 300 000 tonnes, about 80 percent below five-year average. In **Algeria**, production declined by almost 20 percent relative to the five-year average. By contrast, in **Morocco**, although at a below-average level, cereal production in 2023 increased by almost 60 percent compared to the drought-affected 2022 harvest. The production growth in 2023 reflects more conducive weather conditions compared to the preceding year, but seasonal rainfall deficits contained crop productivity. The 2023 cereal outputs in **Egypt** and **Libya** were near the five-year average.

Reflecting the below-average output in 2023, the aggregate cereal import requirement for the 2023/24 marketing year (July/June) is estimated at 51 million tonnes, about 8 percent above the previous year's level. The increase is based on the need to replenish low stocks and have an adequate reserve to limit the impact of potential future market shocks. Wheat import requirements, representing about 60 percent of total cereal imports, are forecast at 30 million tonnes, 8 percent above the five-year average. Due to lower wheat export quotations in the Russian Federation, the portion of wheat imports originating from the Russian Federation increased in 2023/24, with a concurrent drop in wheat imports from the European Union countries and Ukraine.

Food inflation rates at elevated levels

Annual food inflation rates remained at high levels during the last months of 2023 and beginning of 2024. In **Egypt**, the annual food inflation rate fell from a peak of 74 percent in September 2023 to 48 percent in January 2024. Rising prices of protein sources and vegetables, products which are not subsidized by the government, are keeping food inflation rates at elevated levels. In **Tunisia**, the annual food inflation rate peaked in May 2023 but since then fell and in January 2024 was estimated at about 12 percent. In **Algeria**, food prices were 10 percent higher year-on-year in December 2023, although the annual inflation rate has remained mostly stable since the beginning of 2023. In **Morocco**, the annual food inflation rate gradually decreased during 2023 and was estimated at about 4.3 percent in January 2024, below the peak of 21 percent in February 2023. In **Libya**, food prices remained relatively stable throughout the year.

In **Libya**, a strong storm struck the country in September 2023, causing the destruction of two dams and flooding, worsening the acute food insecurity situation. The 2024 Global Humanitarian Overview reports a reduction in the number of acute food insecurity to 250 000 people in 2024, compared to the higher levels in 2023.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
North Africa	18.4	16.8	16.7	11.7	11.0	10.4	5.4	5.4	5.7	35.5	33.2	32.8	-1.2
Algeria	3.2	3.0	2.5	1.4	1.1	1.1	0.0	0.0	0.0	4.6	4.1	3.6	-12.3
Egypt	9.1	9.8	9.7	8.0	8.5	7.8	5.3	5.3	5.6	22.4	23.6	23.1	-2.3
Morocco	4.8	2.7	4.1	1.7	0.8	1.4	0.1	0.0	0.0	6.6	3.5	5.6	+57.4
Tunisia	1.2	1.1	0.3	0.6	0.6	0.0	0.0	0.0	0.0	1.7	1.7	0.3	-80.5

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

WEST AFRICA

Land preparation for 2024 crops ongoing in coastal countries

Land preparation for the 2024 main season cereal crops is underway in southern bimodal rainfall areas of countries along the Gulf of Guinea and planting operations are about to start. In the Sahel, planting of the 2024 cereal crops is expected to begin in May 2024. Weather forecasts until July 2024 point to a high probability of above-average rainfall amounts in Sahelian countries, but a stronger possibility of below-normal rainfall in coastal countries. However, persisting conflicts in the regions of Liptako-Gourma (overlapping Burkina Faso, Mali and the Niger), Lake Chad and northern Nigeria continue to weigh on production prospects given the disruption they cause to agricultural activities.

Aggregate cereal production in 2023 estimated at a slightly above-average level

Harvesting of the 2023 coarse grain crops concluded last December in Sahelian countries, while in coastal countries along the Gulf of Guinea harvesting operations of the second season cereal crops were completed in January 2024. The subregion's aggregate cereal output in 2023 is estimated at 76.7 million tonnes, near the previous year's level and slightly above the five-year average, reflecting generally conducive weather conditions in most cereal-producing areas. At the country level, cereal production is estimated at above-average levels in all coastal countries, except for **Nigeria**, where dry spells, limited access to fields due to insecurity, and rising costs of agricultural inputs led to a decrease in planted area and resulted in a reduced outturn. Estimates point to above-average cereal production in most Sahelian countries, while the harvest was average in **Mali** and below-average in **the Niger** and **Chad**. Production declines in Sahelian countries are mostly due to conflicts, which continued to disrupt agricultural activities, erratic rainfall distribution, limited access to fertilizers and pest outbreaks. Furthermore, the spillover of the security crisis in central Sahel resulted in localized production shortfalls in some areas of northern **Benin**, **Côte d'Ivoire**, **Ghana** and **Togo**.

Prices of coarse grains higher on a yearly basis

In **Nigeria**, prices of millet were between 55 and 75 percent higher on a yearly basis in December 2023, while prices of maize and sorghum were up to double their year-earlier levels. The high cereal prices were underpinned by below-average cereal production in 2023, conflict-related market disruptions and strong local demand. Elevated transport costs and a declining value of the naira added upward pressure on prices. In **Benin**, prices of maize were near their year-earlier levels in January 2024, while prices of sorghum were up to 45 percent higher year-on-year, reflecting high production and transport costs, the latter partially due to increased costs of informal imports of fuel from Nigeria. Furthermore, reduced cross-border flows due to the closure of the border with the Niger contributed to amplifying price increases. In **Togo**, prices of maize remained stable or decreased seasonally between September and December 2023,

Table 7. West Africa cereal production

(million tonnes)

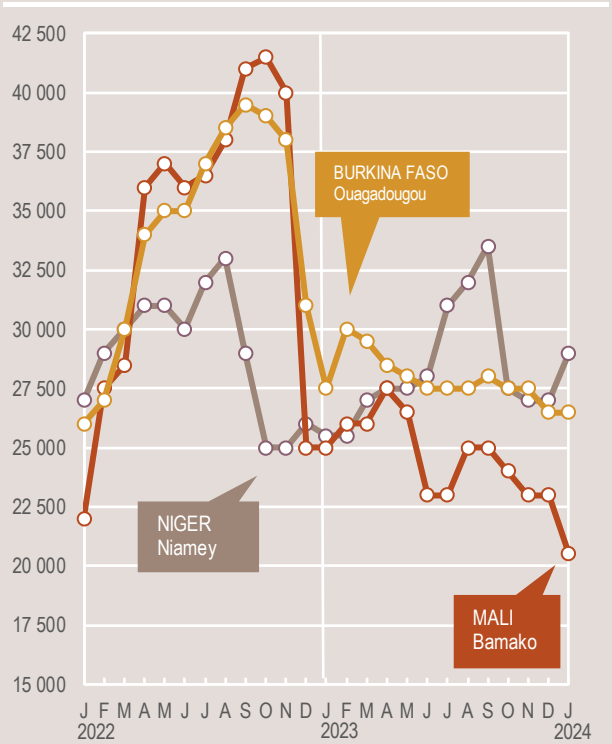
	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
West Africa	52.5	54.8	51.9	21.5	23.2	24.6	74.1	78.1	76.7	-1.8
Burkina Faso	4.6	4.7	4.8	0.4	0.4	0.4	5.0	5.2	5.2	+1.3
Chad	2.6	2.6	2.4	0.3	0.2	0.2	2.8	2.8	2.6	-5.8
Ghana	3.5	3.9	4.0	1.0	1.3	1.3	4.5	5.1	5.4	+4.2
Mali	7.0	7.2	6.9	2.9	2.9	3.0	10.0	10.1	10.0	-1.2
Niger	5.2	5.8	5.0	0.1	0.1	0.2	5.3	5.9	5.2	-12.7
Nigeria	21.4	21.8	19.1	8.4	8.6	8.9	29.9	30.5	28.1	-7.8

Notes: Production data is from early November 2022 and does not include figures from the latest CILSS meeting. Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018-2022 period.

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

but rose by 10 percent month-on-month in January 2024. Prices of sorghum decreased seasonally, but steeply, by about 25 percent in January 2024 compared to the preceding month, reaching their year-earlier levels. In **the Niger**, prices of millet and sorghum were up to 25 percent higher on a yearly basis. The elevated prices of coarse grains were mainly underpinned by the sanctions imposed by ECOWAS, a political and economic union of 15 countries in West Africa, following the military takeover in July 2023, including the suspension of economic and commercial transactions and the closure of borders with Benin and Nigeria, key sources and transit areas for imported food. In addition, high cereal prices were supported by disrupted internal trade flows due to poor security conditions. In **Chad**, prices of millet, sorghum and maize were 15 to 30 percent higher in most markets, on account of the below-average cereal output in 2023, limited internal trade flows, rising transport costs and reduced imports from the Sudan and Libya. An increase in demand due to the significant presence of Sudanese refugees and Chadian returnees, mostly in the country's eastern provinces, added upward pressure on prices. In **Mali**, **Burkina Faso** and **Senegal**, prices of coarse grains were near or below their year-earlier levels in January 2024.

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



High levels of acute food insecurity projected for the 2024 lean season

According to the November 2023 *Cadre Harmonisé* (CH) analysis, about 44.6 million people are projected to face severe acute food insecurity in the subregion during the June to August 2024 lean season, including over 2.1 million people in CH Phase 4 (Emergency). This is above the estimated 42.8 million people in same period in 2023, but prevalence of acute food insecurity is forecast to remain unchanged at 11 percent in 2024.

Persisting conflicts and civil insecurity are key factors underpinning the high prevalence of acute food insecurity in 2024, also causing widespread internal and cross-border displacements, with many displaced in need of humanitarian assistance. In **Burkina Faso**, nearly 3 million people are projected to be severely acute food insecure, including over 425 000 people in CH Phase 4 (Emergency). There is particular concern for the food insecurity situation in the communes under blockade by non-state armed groups (NSAGs), mostly in Sahel, Nord, Centre-Nord, Est, Boucle du Mouhoun and Centre-Est regions, where households have limited access to income-generating activities and food supply as well as humanitarian assistance delivery have been severely constrained. In **Mali**, about 1.4 million people are projected to face severe acute food insecurity, including nearly 55 000 people in CH Phase 4 (Emergency). Worsening insecurity, in particular in northern areas, following the withdrawal of the United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) in December 2023, has triggered new population displacements and disrupted livelihoods and markets. In **the Niger**, over 3.2 million people are projected to be severely acute food insecure, including about 95 000 people in CH Phase 4 (Emergency). The frequency of violent incidents, particularly in Diffa, Maradi, Tahoua and Tillaberi regions, remained high in 2023 and, in some areas, humanitarian access is significantly constrained due to military operations against NSAGs. In **Chad**, nearly 3 million people are projected to face severe acute food insecurity, including about 294 000 people in CH Phase 4 (Emergency) as well as nearly 91 000 Sudanese refugees in the departments of Dar Tama (Wadi Fira) and Kimiti (Sila Region), who are projected to be severely acute food insecure (CH Phase 3 [Crisis] and above). In fact, in Ouaddaï, Wadi Fira and Sila regions, where most Sudanese refugees and Chadian returnees are located, increasing pressure on food stocks and livelihoods, amid inadequate humanitarian assistance, has worsened local food insecurity. In **Nigeria**, about 26.5 million people are projected to be severely acute food insecure, including over 1 million people in CH Phase 4 (Emergency). Since late 2023, conflict and civil insecurity have escalated in northeast, northwest and northcentral states. The deterioration of the security situation is partially driven by the impact of worsening macroeconomic conditions across the country on livelihoods and employment. Macroeconomic challenges are also a key factor underlying acute food insecurity elsewhere in the subregion. Slow economic growth, currency depreciations and high inflation rates, particularly in Sierra Leone, Nigeria, Ghana and the Gambia, are having a negative impact on households' purchasing power and constraining access to food.

CENTRAL AFRICA

Conflicts, displacements and high input prices continuing to affect agricultural production in 2024

Sowing of the 2024 secondary season maize crop, to be harvested from May, is underway in bimodal rainfall areas of **the Congo**, **Gabon** and in northern provinces of **the Democratic Republic of the Congo**. Weather conditions have been generally favourable since December 2023 in most cropland areas. In central provinces of **the Democratic Republic of the Congo**, sowing of the 2024 secondary season maize crop, to be harvested between March and May, concluded in January 2024 under favourable weather conditions in most areas. In the southernmost unimodal rainfall areas of **the Democratic Republic of the Congo**, planting of maize crops, to be harvested from May 2024, finalized in January. Planting of the 2024 main season maize crop will begin in mid-March in **Cameroon** and in **the Central African Republic**, and the harvests are expected to take place from July onwards.

Weather forecasts between March and June 2024 point to a high probability of near-average rainfall amounts across the subregion, with likely positive impact on yields. Nevertheless, the ongoing insecurity and displacements in **the Central African Republic**, **the Democratic Republic of the Congo** and southwest regions of **Cameroon** are expected to continue to affect agricultural activities. In addition, elevated prices of fertilizers and improved seeds, both largely imported, are constraining farmers' access to agricultural inputs, often resulting in low application rates, with negative effects on yields and/or area planted.

Prices of imported food remain at high levels

Domestic prices of imported food products, such as rice, wheat flour and vegetable oil, remained at high levels during the last quarter of 2023. As of December 2023, prices of rice were, on average, almost 10 percent higher than a year before in **Cameroon**, partly reflecting elevated prices on the international market. In **the Central African Republic**, prices of rice weakened in 2023, underpinned by an increase in imports, particularly through river routes, that bolstered domestic supplies.

Over 28 million people acutely food insecure in early 2024

During the first quarter of 2024, about 28.2 million people are estimated to be facing severe acute food insecurity in **the Democratic Republic of the Congo**, **Cameroon** and **the Central African Republic**, approximately one-quarter of the aggregate population. Conflicts and insecurity continued to cause population displacements and widespread disruption of agricultural and market activities, negatively impacting on food availability and access. High food prices and transport costs, coupled with very limited employment opportunities, have substantially reduced households' purchasing power, especially in urban areas, where most households rely on markets to access food. In **the Central African Republic**, the most recent Integrated Food Security Phase Classification (IPC) analysis estimated that about 2 million people, almost half of the total population, were in IPC Phase 3 (Crisis) and above between September 2023 and February 2024. In **Cameroon**, according to the October 2023 CH analysis, the number of acutely food insecure people (CH Phase 3 [Crisis] and above) was estimated at about 2.9 million, 10 percent of the total population, between October and December 2023. In **the Democratic Republic of the Congo**, according to the latest IPC analysis, about 23.4 million people (about 23 percent of the population analysed) are projected to experience acute food insecurity between January and June 2024.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
Central Africa	5.9	5.9	6.0	1.8	2.1	1.9	7.8	8.0	7.9	-0.9
Cameroon	3.5	3.5	3.5	0.3	0.3	0.3	3.8	3.8	3.8	+0.6
Central African Republic	0.1	0.1	0.1	0.0	0.1	0.1	0.2	0.2	0.2	+0.1
Democratic Republic of the Congo	2.2	2.2	2.3	1.5	1.7	1.5	3.7	3.9	3.8	-2.5

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

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

EAST AFRICA

Abundant October-December rains benefited crops and rangelands

Harvesting of the 2023 secondary season cereal crops was concluded in early 2024 in bimodal rainfall areas of **Uganda**, northeastern **United Republic of Tanzania** *vuli*, southern and central **Somalia** *deyr* and in marginal and coastal agricultural areas of southeastern **Kenya** *short-rains*. The October–December rainy season was characterized by abundant precipitation, reflecting El Niño conditions. Despite some localized flood-induced crop losses, cereal harvests are estimated at above-average levels in **Uganda**, **the United Republic of Tanzania** and **Kenya**, as ample rains boosted crop yields. By contrast, heavy rains in key cropping areas of southern **Somalia** caused widespread floods and substantial crop losses.

In **the Sudan**, harvesting of sorghum and millet was completed in January 2024, while the minor irrigated wheat crop will be harvested in March 2024. According to preliminary findings of a government-led 2023 Crop and Food Supply Assessment Mission, cereal production is estimated at a well below-average level. This outcome is mainly due to the conflict that started in April 2023 and caused significant disruptions to agricultural activities, including in southeastern key producing areas during the harvesting period in December 2023. In **South Sudan**, harvesting of the 2023 cereals was also completed in January 2024. According to the preliminary findings of the 2023 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), cereal production in 2023 was higher than in 2022, mainly due to an increase in plantings, reflecting the gradual improvement of the security situation and less extensive flooding.

Overall, the 2023 subregional cereal output is estimated at 53.1 million tonnes, 5 percent below the average production in 2022, as the reduction in **the Sudan** more than offset above-average outputs in **Uganda** and **Kenya**.

The October–December rains were well above average also over pastoral areas of southern **Ethiopia**, central and northern **Somalia** and northern and eastern **Kenya**, and had a mixed impact on local livelihoods. In **Somalia** and **Kenya**, rains benefited livestock production and reproduction, while in southern parts of Oromia and Somali regions of **Ethiopia** precipitation caused widespread floods, causing the loss of 27 500 heads of livestock. By contrast, drought conditions are affecting rangeland resources and animal body conditions in northern pastoral areas of Afar Region.

Land preparation is underway for 2024 main season crops

Land preparation for the 2024 main season cereal crops has started in major growing areas of Central, Rift Valley and Western provinces of **Kenya** *long-rains* season, in southern and central **Somalia** *gu* season and in bimodal rainfall areas of southern **South Sudan** and **Uganda**. In **Ethiopia**, planting of the secondary *belg* season crops is currently underway in eastern Amhara, eastern Oromia, southern Tigray regions and northeastern areas of former northeastern SNNP Region. In Amhara and Oromia regions, clashes between armed groups are disrupting agricultural operations and plantings are likely to be constrained. In central and southern unimodal rainfall areas of **the United Republic of Tanzania**, November to April *msimu* rainfall amounts were above average, positively impacting vegetation conditions in cropped areas.

In **Rwanda** and **Burundi**, harvesting of the *2024A* season crops was concluded in January 2024. In both countries, average to above-average rainfall amounts boosted crop yields and cereal production is estimated at above-average levels.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), above-average rainfall amounts are expected over most of the subregion for the 2024 March to May rainy season, with a likely positive impact on yields of crops to be harvested between June and August.

Exceptionally high prices of coarse grains in the Sudan and South Sudan

In **the Sudan**, prices of key food staples sorghum and millet were volatile and at high levels in late 2023, due to the impact of the conflict that has disrupted the movement of grains within and into the country. In **South Sudan's** capital, Juba, prices of maize and sorghum increased between September and

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[I]			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
East Africa	6.6	6.6	6.6	47.0	45.9	43.4	58.4	57.7	54.8	-5.1
Ethiopia[II]	5.5	5.8	5.8	23.0	22.8	22.8	28.7	28.8	28.9	+0.3
Kenya	0.3	0.3	0.3	3.9	3.3	3.6	4.4	3.8	4.1	+10.2
Sudan	0.7	0.5	0.4	6.7	7.2	3.8	7.4	7.7	4.2	-45.8
Uganda	0.0	0.0	0.0	3.5	3.1	3.5	3.8	3.3	3.8	+13.6
United Republic of Tanzania	0.1	0.1	0.1	7.6	7.2	7.2	11.5	11.4	10.9	-4.8

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

[I] Total cereals include wheat, coarse grains and rice (paddy).

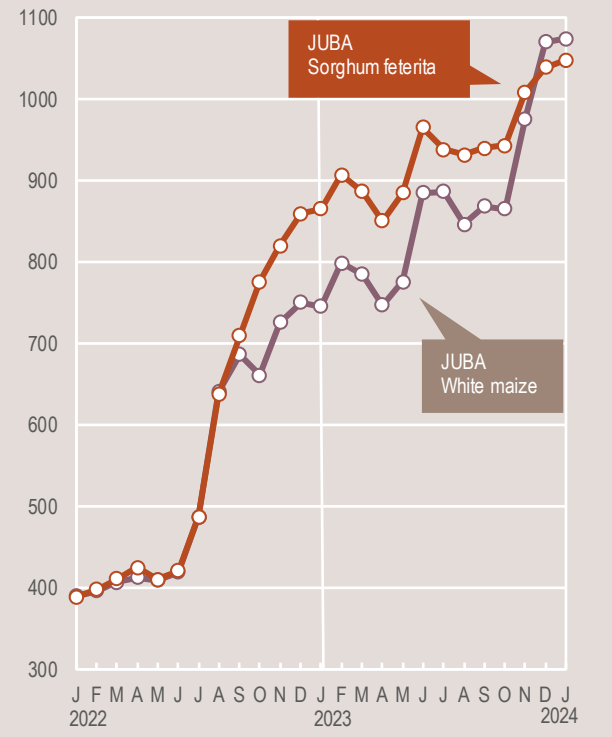
[II] Official production estimates for Ethiopia by the Ethiopian Statistics Service from 2020 onwards do not include Tigray Region.

December 2023 by about 25 and 10 percent, respectively, in part driven by a depreciation of the national currency on the parallel market. Although a firmer exchange rate in January 2024 and the arrival of the second season crops increased market supplies caused prices to level off, prices were still at record levels due to the cumulative impacts of protracted macroeconomic challenges and insufficient domestic supply. In **Uganda**, prices of maize fell by about 15 percent between October and December 2023, reflecting a seasonal upturn in the domestic supply following the second season harvest. Prices in December 2023 were about 35 percent below the elevated year-earlier levels. Similarly, in **Kenya**, prices of maize decreased by 20–35 percent between August and December 2023 with the *long-rains* harvest. Prices in January 2024 remained stable and were about 15 percent lower than the very high year-earlier levels. Prices of maize declined unseasonably by about 10 percent between August and November 2023 in **the United Republic of Tanzania** as reduced exports, due to trade restrictions, increased domestic availability. In **Somalia**, prices of locally produced sorghum and maize increased by 10–35 percent between September and December 2023, with seasonal patterns compounded by flood-driven trade disruptions. Prices in December 2023 were 10–30 percent lower year-on-year in several markets, as the delivery of humanitarian food assistance exerted downward pressure. In **Ethiopia**, prices of locally produced maize increased by about 60 percent in the year to December 2023 to near-record levels, mainly due to the continuous depreciation of the national currency that inflated production and transport costs.

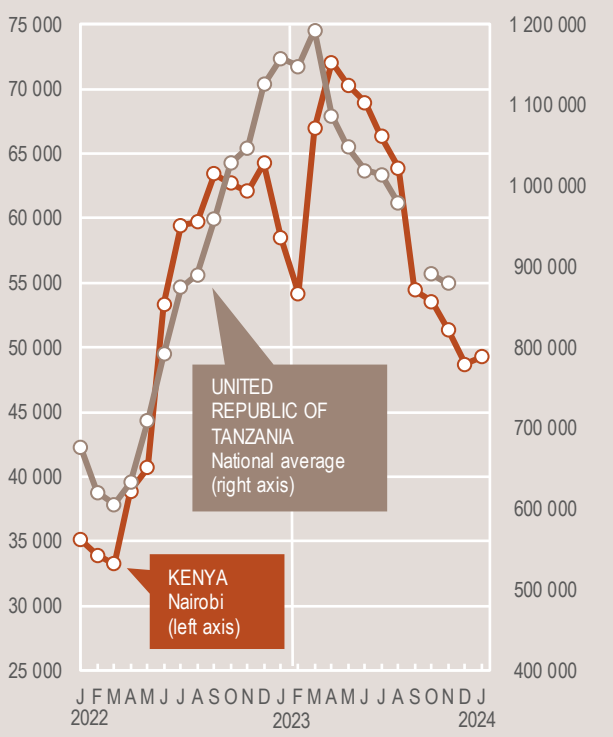
Dire food insecurity situation in the Sudan due to conflict

In **the Sudan**, the conflict has severely disrupted livelihoods, paralyzed economic activities and triggered large-scale population displacements. According to the latest IPC analysis, about 17.7 million people, representing 37 percent of the population, were estimated to face severe acute food insecurity between October 2023 and February 2024. In **South Sudan**, about 5.78 million people are estimated to face severe acute food insecurity between December 2023 and March 2024. This figure amounts to 46 percent of the total population and includes about 11 000 people in the Greater Pibor Administrative Area and 14 000 returnees from the conflict-affected Sudan facing IPC Phase 5 (Catastrophe). The main drivers of the dire food insecurity situation are the protracted macroeconomic crisis, insufficient food supply, the lingering impact of consecutive years of widespread floods and episodes of intercommunal violence. In **Somalia**, 4 million people, more than 20 percent of the total population, are estimated to face severe acute food insecurity between January and March 2024. The main drivers are the lingering impact of a prolonged drought between late 2020 and early 2023, floods in late 2023 which affected about 2.5 million people and heightened conflict since August 2023. In **Kenya**, in the 23 counties classified as rural Arid and Semi-Arid Lands (ASAL), covering most of the country, about 1.5 million people were estimated to face severe acute food insecurity between October 2023 and January 2024. This figure amounts to about 10 percent of the analysed population, compared to a prevalence of 30 percent in the same period in 2022/23. The improvement in food security was driven by favourable weather conditions in 2023, which had a beneficial impact on crop and livestock production, and marked the end of the 2020–2023 drought. In **Ethiopia**, according to the 2024 Humanitarian Response Plan, about 15.8 million people are officially estimated to be facing severe acute food insecurity, mainly due to the impact of weather extremes, conflict in northern areas and high food prices.

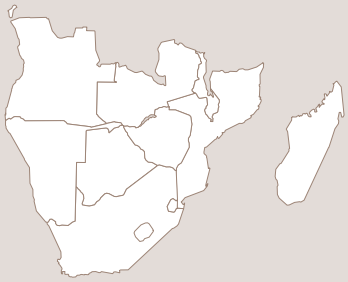
Retail prices of maize and sorghum in South Sudan
(South Sudanese pound/kg)



Wholesale prices of maize in selected East African markets
(Kenya shilling/tonne) (Tanzanian shilling/tonne)



SOUTHERN AFRICA



Dryness across the subregion foreseen to push down 2024 cereal production

Harvesting of the 2024 cereal crops is expected to start in April, later than normal on account of a slow onset of seasonal rains. Reflecting typical El Niño conditions that have influenced weather conditions in 2023/24, cumulative rainfall amounts across large portions of the subregion have been well-below average. Key cropping zones in **Malawi**, **Mozambique**, **Zambia** and **Zimbabwe**, as well as in the more minor cereal-producing country of **Namibia**, received only up to 80 percent of average rainfall quantities between mid-November 2023 and February 2024. Significant rainfall deficits were recorded in February, a period when moisture stress tends to have a more acute impact on crop yield potentials, and remote sensing data indicated stressed vegetation conditions at the end of this month. Warmer-than-average temperatures and an erratic temporal distribution of rains are additional aggravating factors. The weather outlook points to continued below-average rainfall amounts in March and April, suggesting a low likelihood of any recovery in cereal crop conditions and yields are therefore expected at average to below-average levels in 2024.

In **South Africa**, the leading cereal producer in the subregion, following a favourable start of the rainy season, there has been a downturn in production prospects due to a dry spell between late January and February 2024. Moisture deficits, as well as higher-than-average temperatures, came at a critical time for crop development, consequently denting yield prospects. As a result, maize production in 2024 is foreseen to fall year-on-year, but still remain above average, supported by large plantings. In neighbouring **Eswatini** and **Lesotho**, cereal crops have also suffered from excessive temperatures and erratic temporal distribution of rainfall , and production is expected to remain at near-average levels in 2024. In **Madagascar**, paddy crop conditions appear generally favourable, particularly in key producing areas of the central highlands. Dryness has been developing in the south of the country, where maize is mostly grown.

Cereal import needs expected to increase in 2024/25 marketing year

Subregional cereal output in 2023 is estimated at 40.3 million tonnes, 9 percent above the five-year average. Production growth in 2023 was largely concentrated in **South Africa** and **Zambia**, two key maize exporting countries of the subregion, as well as in **Madagascar** and **Zimbabwe**.

Total cereal import requirements for the 2023/24 marketing year (generally May/April) are pegged at 8.3 million tonnes, moderately down from the five-year average. This is mostly due to lower import needs for maize, as the large domestic harvests in 2023 are satisfying an increased proportion of national consumption needs. Looking ahead, based on the likely scenario of a fall in cereal production, import needs are set to increase in the 2024/25 marketing year. Furthermore, if production declines in **South Africa** and **Zambia** materialize in 2024, export availabilities in the subregion would be low and this could necessitate the importation of maize from outside of Southern Africa.

Food inflation reaches multi-year highs in early 2024

In most countries, cereal prices were at higher year-on-year levels in December 2023 and January 2024, reflecting the cumulative impacts of weather shocks on 2023 domestic production, elevated international commodity prices and weak currencies that intensified exchange rate pass-through effects to domestic prices. Farther ahead, a key upside risk to the price growth is represented by the impact of El Niño-related rainfall deficits on cereal production in 2024. In **South Africa**, while still at lower year-on-year levels, wholesale prices of maize grain increased in February 2024 as concerns mounted over the impact of rainfall shortages on crop production. Prices of white maize rose at a quicker

Table 10. Southern Africa cereal production

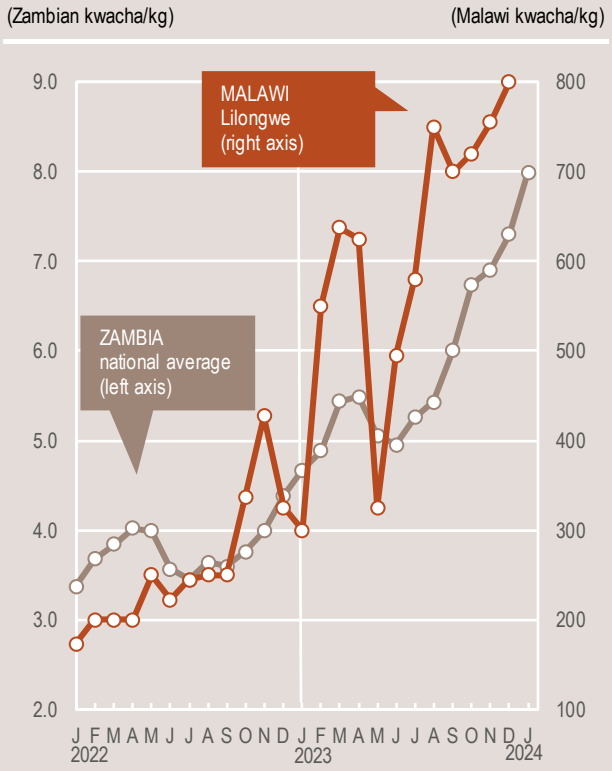
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
Southern Africa	2.5	2.8	2.7	29.6	30.9	32.2	4.7	5.2	5.4	36.8	38.9	40.3	+3.6
excl. South Africa	0.4	0.6	0.6	14.2	14.3	15.2	4.7	5.2	5.4	19.3	20.1	21.3	+6.0
Madagascar	0.0	0.0	0.0	0.2	0.3	0.3	4.1	4.6	4.8	4.4	4.9	5.1	+4.9
Malawi	0.0	0.0	0.0	3.8	3.9	3.7	0.1	0.1	0.1	3.9	4.0	3.8	-5.7
Mozambique	0.0	0.0	0.0	2.3	2.1	2.2	0.4	0.4	0.4	2.7	2.5	2.6	+4.9
South Africa	2.0	2.2	2.1	15.4	16.6	17.0	0.0	0.0	0.0	17.4	18.9	19.0	+1.0
Zambia	0.2	0.3	0.3	2.9	2.7	3.3	0.0	0.1	0.1	3.1	3.1	3.7	+20.1
Zimbabwe	0.2	0.3	0.3	1.8	1.8	2.3	0.0	0.0	0.0	2.0	2.0	2.6	+27.8

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

pace than yellow maize, reflecting the more pronounced precipitation deficits in western parts of the country where most white maize is produced. In net cereal importing countries of **Botswana**, **Eswatini** and **Namibia**, retail prices of maize meal were generally stable in the last quarter of 2023. Similarly, maize grain prices were higher on a yearly basis in **Mozambique**, but had been mostly unchanged during the last quarter of 2023, aided by a steady exchange rate against the United States dollar. In **Malawi**, there was a steep upturn in the food inflation rate in January 2024, when it was estimated at a multi-year high of 45 percent, up from 37 percent from the previous month. A key driver is the weak national currency, which was devalued by about 40 percent in late 2023. In **Zambia**, the national average price of maize grain reached a new record high in January 2024, and it was more than 70 percent higher on a yearly basis. Also here, the currency weakness is a major factor underpinning the sharp price growth. In **Zimbabwe**, there was a jump in the national inflation rate in January 2024, when it reached 35 percent, up from 27 percent in the previous month. The increase is largely attributed to a sharp loss of value of the national currency, which is the key factor that contributed to the surge in the cost of living in the last two years.

Maize grain prices in selected Southern African markets



Widespread dry weather conditions anticipated to worsen acute food insecurity

Dryness across the subregion is expected to have an extensive negative impact on acute food insecurity in 2024/25. Concerns mostly relate to a likely downturn in agricultural production and its implications for food availability and access, due to losses of income for rural households and potential upturns in prices driven by supply pressures. Weak national currencies are also continuing to play a role in raising the cost of living in several countries.

Taking into consideration the most recent IPC analyses and estimates from national assessments, the aggregate number of acute food insecure people, excluding South Africa, is estimated at just over 16 million between January and March 2024, moderately up from last year's level. The increase is largely attributed to localized shortfalls in production in 2023, which had a negative impact, particularly on rural households, and high inflation rates that have eroded the purchasing power across population groups and countries.

REGIONAL REVIEWS
ASIA

Countries with unfavourable cereal production prospects in 2023*

Bhutan: limited availability of agricultural inputs and localized unfavourable weather conditions

Myanmar: limited availability of agricultural inputs and localized unfavourable weather conditions

*/** See Terminology (*page 7*).
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.

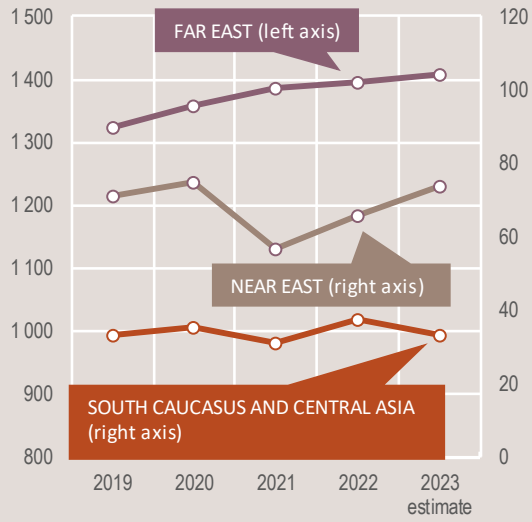
Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 1.* Cited 8 March 2024, modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Production Overview

Aggregate cereal output in Asia is pegged at 1 514 million tonnes in 2023, including rice in paddy terms, an all-time high. Upturns in coarse and wheat harvests in Far East Asian countries largely underpinned the substantial aggregate output, while there was a recovery in paddy production in Sri Lanka. Wheat production also increased in Near East Asian countries, resting on conducive weather conditions. Among Central Asian countries, production fell driven by a decline in Kazakhstan, the leading producer of the subregion.

The 2024 wheat crop is expected to be harvested from April in Far East Asia and early production prospects point to another bumper output, underpinned by large plantings and mostly beneficial weather. Generally conducive weather conditions were present in Near East Asia, but sustained good rains are needed to shore up production prospects, while early seasonal rainfall deficits in Central Asian countries are impairing yield expectations.

Cereal production
(million tonnes)



FAR EAST

Favourable production prospects for 2024 winter crops

Harvesting of 2024 winter wheat crops, mostly produced under irrigation, is expected to take place between April and June 2024, and production prospects are generally favourable in most countries. The subregion's total area planted is estimated to be above the five-year average, mainly driven by strong local demand for wheat-based products. In **China (mainland)**, field assessments from mid-February 2024 indicated near-average growing conditions for the 2024 winter wheat crops, which have recently broken dormancy in northern parts of the country, while they are already at the tillering to jointing stages of development in eastern and central parts. Aggregate 2024 wheat production, including the minor spring crop to be planted from mid-March, is forecast at a slightly above-average level of 136.3 million tonnes. In **India**, a bumper 2024 wheat production is expected, reflecting adequate irrigation water supplies and overall conducive weather conditions that supported good crop growth, except in localized areas of important wheat producing states of Uttar Pradesh and Bihar, where below-average precipitation amounts between November 2023 and January 2024 affected developing crops. In **Pakistan**, despite dry weather conditions since November 2023, above-average yields are expected in the main wheat cropping areas on account of a sufficient supply of irrigation water. Assuming favourable growing conditions for the reminder of the season, the output is forecast at an above-average level of 28.3 million tonnes. In **Afghanistan**, inadequate soil moisture at planting time hampered sowings operations for the 2024 winter wheat crop, while limited snow cover in northern parts of the country increased the danger of winterkill. These conditions are likely to keep production in 2024 below the five-year average.

Cereal output in 2023 etimated at above-average level

Subregional 2023 aggregate cereal output is estimated at an above-average level of 1 400 million tonnes (rice in paddy equivalent), reflecting bumper main harvests and favourable prospects for secondary crops, which are expected to be harvested in the first half of 2024. Production of paddy, the major staple crop in the subregion, is forecast at an above average level of 701 million tonnes, on expectations of larger-than-average outputs in **Bangladesh**, **Cambodia**, **India**, **the Lao People's Democratic Republic**, **Pakistan** and **Thailand**. In **Viet Nam** and **the Philippines**, production is forecast close to a near-average level. Below-average outputs are expected in **Indonesia** and **Malaysia**, mostly due to weather conditions associated with the El Niño phenomenon, as well as in **Afghanistan**, **Bhutan** and **Myanmar**. In **China (mainland)**, paddy production is estimated below the five-year average in 2023 for the second consecutive year, as well as in **Japan** and **the Republic of Korea**, mostly due to a decline in rice consumption. Production of coarse grains, mostly maize, is forecast at 417 million tonnes, 7 percent above the five-year average, owing to large plantings due to strong demand by the feed industry. Bumper maize outputs are forecast in the subregion's main producing countries, including **Bangladesh**, **China (mainland)**, **India**, **Pakistan** and **the Philippines**. Below-average outputs are expected in **Viet Nam**, due to low sowings as farmers preferred to grow more profitable vegetables and cash crops, and in **Nepal** and **the Lao People's Democratic Republic**, where dry weather conditions reduced yields in important maize producing areas. The 2023 wheat harvest finalized in June 2023 and the total output in the subregion is estimated at an above-average level of 284 million tonnes.

Cereal exports forecast above the five-year average in 2023/24

In the 2023/24 marketing year, subregional cereal exports are forecast at 56.2 million

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
Far East	275.2	280.3	284.6	389.9	410.9	419.1	690.7	703.3	703.4	1 355.9	1 394.5	1 407.2	+0.9
Afghanistan	4.3	3.8	4.3	0.3	0.3	0.3	0.6	0.6	0.6	5.2	4.7	5.2	+9.5
Bangladesh	1.1	1.1	1.2	3.9	4.3	4.6	56.0	57.8	58.6	60.9	63.1	64.3	+1.9
Cambodia	0.0	0.0	0.0	1.0	1.2	1.5	11.3	11.6	12.9	12.3	12.8	14.4	+12.7
China (mainland)	134.8	137.7	136.6	276.1	287.5	299.3	211.0	208.5	206.6	621.9	633.7	642.4	+1.4
India	105.7	107.7	110.6	50.1	56.8	54.3	187.5	203.6	201.1	343.3	368.1	365.9	-0.6
Japan	1.0	1.0	1.1	0.2	0.2	0.2	10.5	10.4	10.3	11.7	11.6	11.6	-0.1
Myanmar	0.1	0.1	0.1	2.4	2.4	2.5	26.6	24.7	25.6	29.2	27.2	28.3	+4.0
Nepal	2.1	2.1	2.1	3.3	3.4	3.2	5.5	5.5	5.7	10.8	11.0	11.0	-0.1
Pakistan	25.7	26.2	28.2	9.3	11.5	10.8	11.9	11.0	13.0	46.9	48.6	51.9	+6.8
Philippines	0.0	0.0	0.0	8.1	8.3	8.1	19.4	20.0	19.5	27.5	28.3	27.6	-2.8
Republic of Korea	0.0	0.0	0.1	0.2	0.2	0.2	5.0	5.0	4.9	5.3	5.2	5.2	-1.4
Sri Lanka	0.0	0.0	0.0	0.3	0.2	0.3	4.4	3.4	4.3	4.7	3.6	4.6	+28.5
Thailand	0.0	0.0	0.0	4.9	5.1	5.1	31.9	33.9	33.4	36.8	39.0	38.5	-1.3
Viet Nam	0.0	0.0	0.0	4.6	4.4	4.4	43.4	42.7	43.5	48.0	47.1	47.9	+1.6

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

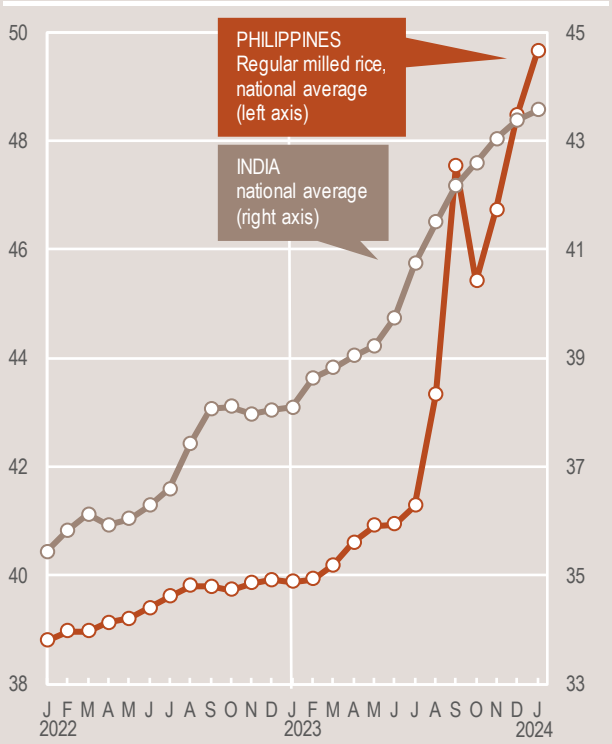
tonnes (rice in milled terms), 15 percent above the five-year average. Most of this quantity is milled rice, forecast in the 2024 calendar year at 45.3 million tonnes. The good export prospects reflect an anticipated increase in shipments from **Pakistan**, **Myanmar** and **Cambodia** that are expected to more than offset reduced exports from **India**, following the implementation of several rice export restrictions since September 2022, and **Viet Nam**. Wheat exports in 2023/24 are forecast well below the five-year average, reflecting scaled back expectations in India, the leading exporter in the subregion, following restrictions on wheat exports since May 2022.

The total subregional cereal import requirement in the 2023/24 marketing year is forecast at 173.7 million tonnes, 14 percent above the five-year average, mostly due to strong demand for coarse grains by the feed industry. Rice imports in calendar year 2024 are forecast to increase slightly year-on-year to 17.8 million tonnes. Wheat imports are forecast near the five year average.

Domestic rice prices significantly above year-earlier levels

Domestic retail prices of rice were significantly higher year-on-year in January 2024, especially in importing countries of **Bhutan**, **Indonesia**, **Nepal**, **the Philippines** and **Timor-Leste**. The high cost of production and transport contributed to

Rice retail prices in selected Far East countries



Wheat flour retail prices in selected Far East countries

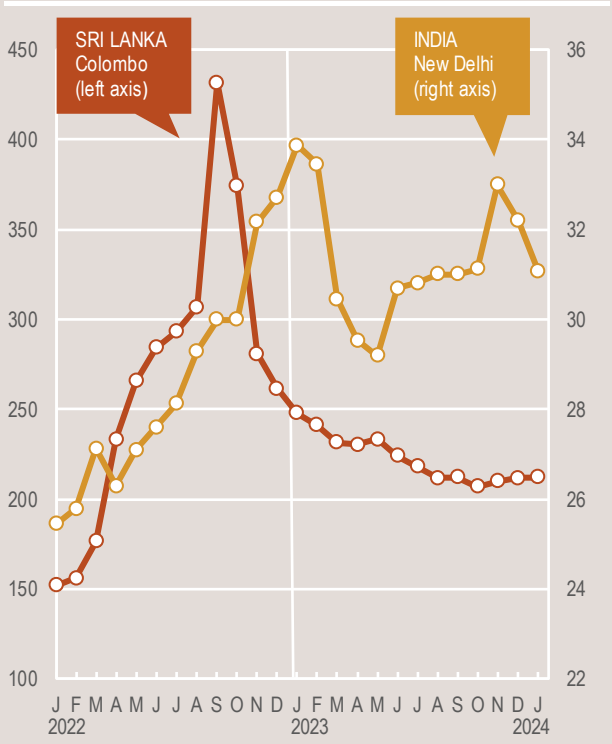


Table 12. Far East cereal production and anticipated trade in 2023/24

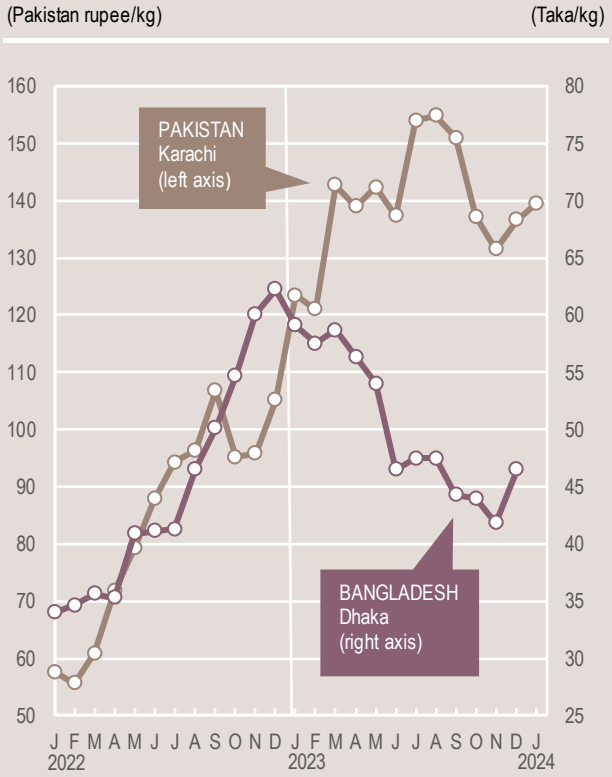
(thousand tonnes)

	5-year average (2018/19 to 2022/23)	2022/23	2023/24	Change: 2023/24 over 2022/23 (%)	Change: 2023/24 over 5-year average (%)
Coarse grains					
Exports	*5 594*	*7 041*	*7 471*	*+6.1*	*+33.6*
Imports	*85 469*	*83 308*	*99 808*	*+19.8*	*+16.8*
Production	*389 897*	*410 881*	*419 135*	*+2.0*	*+7.5*
Rice (millled)					
Exports	*41 294*	*45 264*	*43 941*	*-2.9*	*+6.4*
Imports	*15 616*	*17 285*	*17 681*	*+2.3*	*+13.2*
Production	*455 401*	*468 367*	*468 349*	*-0.0*	*+2.8*
Wheat					
Exports	*4 909*	*6 838*	*2 859*	*-58.2*	*-41.8*
Imports	*58 403*	*61 518*	*61 127*	*-0.6*	*+4.7*
Production	*275 244*	*280 312*	*284 619*	*+1.5*	*+3.4*

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

the higher prices, as did trade disruptions following the export ban of non-basmati white rice by India. In exporting countries of **Thailand** and **Viet Nam**, rice prices in January 2024 were between 40 and 50 percent above their year-earlier levels, due to strong import demand. In **Myanmar**, the price of rice *emata* increased gradually since early 2022 and reached record levels in January, driven by tight market availability and conflict related market disruptions. Prices of wheat and wheat flour were generally stable between November 2023 and January 2024, and close to their year-earlier levels in **China (mainland)** and **India**, reflecting good market availability from the bumper output in 2023. In **Pakistan**, domestic prices of wheat flour in January were 65 percent higher than the elevated levels a year earlier, supported by a tight market supply and general inflationary pressure reflecting increasing energy prices. In **Afghanistan**, wheat flour prices declined between November 2023 and January 2024 to levels lower year-on-year, in line with international price trends.

Wheat flour retail prices in selected Far East countries



Large numbers of people acutely food insecure in several countries

High domestic food prices, economic downturns and reduced livelihood opportunities continue to have a significant impact on acute food insecurity levels in several countries of the subregion. In **Afghanistan**, according to the latest IPC analysis, about 15.8 million people are projected to face high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) from November 2023 to March 2024, a slight improvement from the previous year's level, largely due to scaled-up humanitarian assistance. In **Pakistan**, the number of people facing high levels of acute food insecurity between November 2023 and January 2024 was estimated at 11.8 million, compared to 10.5 million people in the April to October 2023 period. In **Timor-Leste**, 262 000 people, 20 percent of the total population, faced high levels of acute food insecurity from May to September 2023 and the situation is likely to worsen in 2024 due to the adverse effects of the ongoing dry weather conditions on crop production, affecting farmers' livelihoods and exerting additional upward pressure on the already high food prices. In **Myanmar**, an intensification of the conflict, record-high food prices and the devastation caused by Cyclone Mocha in May 2023 led to a severe deterioration of acute food insecurity. As of January 2024, the number of internally displaced people (IDPs) reached the record high level of 2.6 million, more than double the level of the same period in 2023. In **Bangladesh**, about 1 million Rohingya refugees from Myanmar, most of whom reside in Cox's Bazar District, are highly dependent on humanitarian assistance. In **the Democratic People's Republic of Korea**, the food security situation is expected to remain fragile in the first half of 2024.

In **Mongolia**, food insecurity conditions of the herding population are expected to deteriorate in 2024 due to the adverse effect of an ongoing *dzud*, a winter period characterised by heavy winter snow and low temperatures. An estimated 2 million heads of livestock, 3 percent of the country's total livestock population, have already perished during the 2023/24 winter season, negatively affecting the livelihoods of about 190 000 herder households.

NEAR EAST

Generally favourable production prospects for 2024 winter cereal crops but conflicts curtail opportunities in parts

Planting of the 2024 winter grain crops, for harvest from May, finished in January 2024. Temporal and spatial rainfall distribution across the subregion was uneven between October 2023 and February 2024, with below-average cumulative precipitation in parts, yet still generally sufficient for crop establishment. In February, pockets of heavy rain led to localized infrastructure damages in southern **Türkiye**, while dryness was developing in the northeastern **Islamic Republic of Iran**. Higher-than-average temperatures, up to 10 degrees Celsius (°C) above-normal levels in parts of Türkiye and the Islamic Republic of Iran, accelerated crop development. For the remainder of the cropping season, sustained rainfall is needed to maintain the overall good crop production prospects. The preliminary forecast for wheat production in Türkiye points to a near-average output of 20 million tonnes in 2024 and a near-average production of 13 million tonnes is forecast for the Islamic Republic of Iran.

In countries experiencing difficult socioeconomic circumstances due to conflicts or economic crises, including **Palestine**, **Lebanon**, **the Syrian Arab Republic** and **Yemen**, farmers' access to inputs remains constrained by the lack of liquidity and high prices of mostly imported inputs. Particularly dire conditions prevail in the Gaza Strip (Palestine), where nearly all agricultural activities have been halted. A rapid geospatial damage assessment of the conflict on agricultural land and infrastructure revealed that 27.5 percent (4 319 hectares) of all crop land in the Gaza Strip has been damaged. Agricultural and general infrastructure have also been damaged. Extremely limited availability of inputs, most of which have been imported in the past, further threatens any agricultural production.

Above-average 2023 cereal production lowers import requirements

Total 2023 subregional cereal production (rice in paddy terms) is estimated at 73.6 million tonnes, 12 percent above the previous year's close-to-average harvest. Cereal production recovered in all major producing countries in 2023 on account of more favourable weather conditions. The largest year on year increases were recorded in the Syrian Arab Republic and Iraq. In **the Syrian Arab Republic**, cereal production more than doubled to 3.4 million tonnes from the drought-stricken 2022 harvest and it was about 11 percent above average. An increase in production of over 70 percent in **Iraq** to an estimated 4.6 million tonnes, is attributed to better rainfall amounts and distribution, coupled with an increased use of irrigation and underground water resources, in a quest to reduce wheat import requirements. Elsewhere, year-on-year production changes were more contained in other countries.

The subregional cereal import requirement in the 2023/24 marketing year (July/June) is forecast at a near-average level of 72 million tonnes, 3 percent below the previous year's level, reflecting improved domestic harvests in 2023. The wheat import requirement is forecast at an average level of 32.19 million tonnes, about 14 percent below the previous year's imported quantity.

Large number of people remain acutely food insecure

Lingering and fresh conflicts, economic downturns and reduced livelihood opportunities continue to have a significant impact on acute food insecurity levels in many countries of the subregion.

In **Palestine**, as of 7 February 2024, the entire population in Gaza Strip (2.2 million people) faced high levels of acute food insecurity (IPC Phase 3 [Crisis] and above). Over 50 percent (1.17 million people) were classified in IPC Phase 4 (Emergency). At least one in four, more than 500 000 people were classified in IPC Phase 5 (Catastrophe) conditions, experiencing an extreme lack of food, starvation and an exhaustion of coping capacities.

In **Yemen**, the last country-wide IPC assessment was conducted in 2022 and indicated that nearly 17 million people, over half of the national population, were classified in IPC Phase 3 (Crisis) and above between October and December 2022. More recently in

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
Near East	39.1	37.8	43.6	21.9	23.7	25.7	5.0	4.6	4.4	65.9	66.1	73.6	+11.5
Iran (Islamic Republic of)	13.2	13.0	13.5	3.8	4.1	4.1	3.8	3.6	3.5	20.8	20.7	21.1	+1.8
Iraq	4.0	2.8	4.2	1.1	0.4	0.3	0.0	0.0	0.0	5.4	3.2	4.6	+43.6
Türkiye	19.4	19.8	22.0	14.9	18.0	19.3	1.0	1.0	0.9	35.3	38.7	42.2	+9.1

Notes: Totals and percentage changes are\ computed from unrounded data. The five-year average refers to the 2018–2022 period.

2024, a partial IPC analysis that was only conducted in areas controlled by the Government of the Republic of Yemen, revealing that approximately 4.56 million people, 45 percent of the analysed population, were facing high levels of acute food insecurity (IPC 3 Phase [Crisis] and above) between October 2023 and February 2024. Out of this figure, 1.3 million people were classified in IPC Phase 4 (Emergency). The updated analysis showed a 4-percentage point increase in the prevalence of acute food insecurity among the analysed population compared to projections from an earlier partial IPC analysis in 2023. Efforts to prevent a further deterioration of food insecurity remain hampered by conflict, the fiscal and economic challenges, limited institutional capacity, poor infrastructure, and the lack of adequate essential services.

In **the Syrian Arab Republic**, according to the 2024 Humanitarian Needs Overview (HNO), at least 12.9 million people, more than half of the population, were estimated to be in need of food assistance in 2024, mostly on account of economic challenges and limited livelihood opportunities.

In **Lebanon**, between October 2023 and March 2024, about 1.05 million Lebanese, Syrian refugees, Palestine refugees from Lebanon and Palestine refugees from the Syrian Arab Republic are facing acute food insecurity and are classified in IPC Phase 3 (Crisis) and above, corresponding to 19 percent of the analysed population. Between April and September 2024, about 1.14 million people are expected to face high levels of food insecurity and are likely to be in IPC Phase 3 (Crisis) and above, corresponding to 21 percent of the analysed population. The situation is mainly due to the multifaceted crisis that the country is facing. The IPC analysis took place between 2 and 13 October 2023 and it was assumed that tensions at the southern border would not escalate into a wider conflict.

SOUTH CAUCASUS AND CENTRAL ASIA

Poor rains negatively affecting 2024 winter cereal crops

Planting of the 2024 winter cereals, to be harvested between June and September 2024, finalized in November 2023 and the total area planted is estimated to be near the five-year average. In **Kazakhstan**, **Turkmenistan** and **Uzbekistan**, cumulative precipitation amounts between September 2023 and February 2024 were below average and weather forecasts point to a high probability that rainfall amounts will remain low until April 2024. The less-than-favourable conditions are impairing

Table 14. South Caucasus and Central Asia cereal production

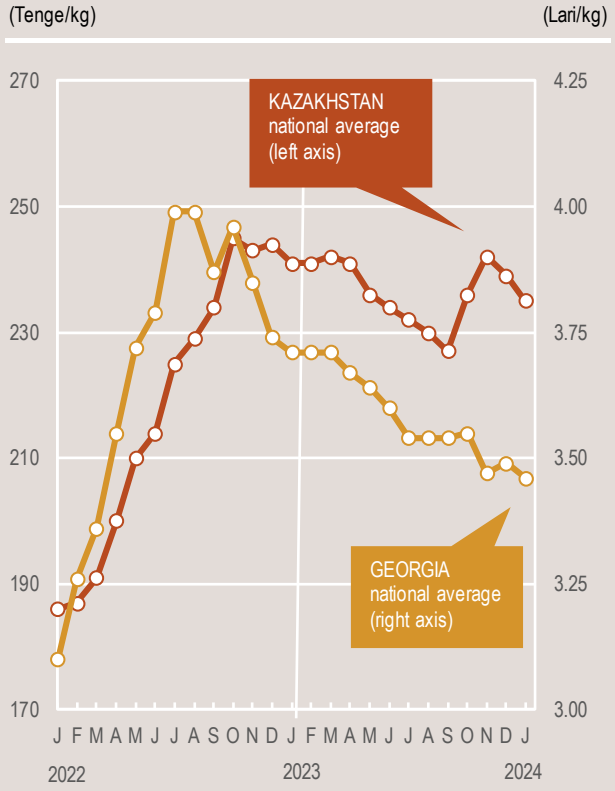
(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
South Caucasus and Central Asia	24.3	27.1	23.3	8.9	9.1	8.8	34.3	37.3	33.2	-11.0
Armenia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	+1.1
Azerbaijan	1.9	1.7	2.0	1.4	1.4	1.4	3.3	3.1	3.4	+11.8
Georgia	0.1	0.2	0.1	0.3	0.2	0.3	0.4	0.4	0.4	+16.3
Kazakhstan	13.6	16.4	12.1	4.8	4.8	4.6	18.9	21.6	17.2	-20.4
Kyrgyzstan	0.6	0.5	0.5	1.2	1.3	1.1	1.8	1.9	1.6	-12.1
Tajikistan	0.8	0.8	1.1	0.4	0.4	0.3	1.3	1.3	1.5	+9.2
Turkmenistan	1.2	1.1	1.1	0.1	0.1	0.1	1.3	1.2	1.2	-0.1
Uzbekistan	6.0	6.3	6.3	0.8	0.9	0.9	7.1	7.6	7.6	-0.2

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

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

Retail wheat flour prices in selected South Caucasus and Central Asia countries



yield prospects of the 2024 crops, also as water availability in reservoirs used for irrigation during the summer months (June to September 2024) could be affected.

Below-average wheat production in 2023

The aggregate 2023 subregional cereal output is estimated at a below-average level of 33.2 million tonnes. Production of wheat, which accounts for more than 70 percent of the total cereal output, is estimated at slightly below the five-year average, at 23.3 million tonnes, driven by low outputs in **Kazakhstan** and **Kyrgyzstan**. In **Kazakhstan**, the main wheat producer in the subregion, the 2023 domestic wheat output is estimated at a below-average level of 12.1 million tonnes, due to insufficient precipitation amounts and higher-than-average temperatures. The estimate of the 2023 subregional coarse grain output stands at 8.8 million tonnes, near the five-year average.

Domestic prices of wheat flour down year on year

In **Kazakhstan**, average retail prices of wheat flour in January 2024 decreased by about 5 percent year-on-year, amid weak demand and strong competition from the Russian Federation. In **Armenia**, prices of wheat flour decreased between October 2023 and January 2024, and were almost 10 percent lower year-on-year, as large import volumes in 2023 bolstered domestic availabilities. In **Azerbaijan** and **Georgia**, prices of wheat flour decreased gradually since October 2023 in line with seasonal trends and, in January 2024, were 5 and 7 percent, respectively, below their year-earlier values.

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

** See Terminology (*page 7*).
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).

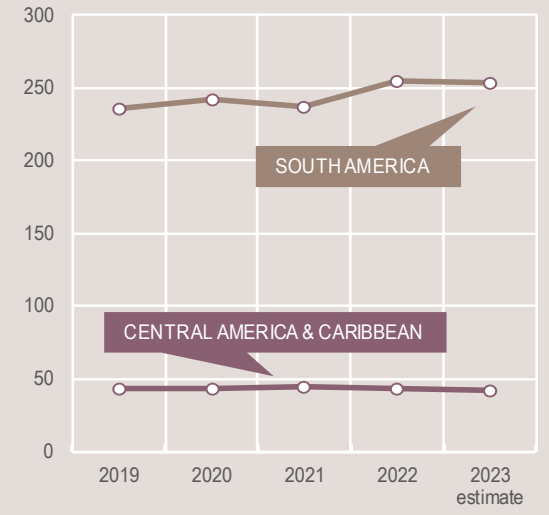
Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 1*. Cited 8 March 2024, modified to comply with the United Nations map No. 4170 Rev. 19, 2022.

Production Overview

Cereal production in 2023 is estimated at 295.9 million tonnes, including rice in paddy terms, marginally short of the record high in 2022. The substantial output in 2023 is underpinned by bumper maize outputs in South America, particularly in Brazil where an all-time high maize harvest was estimated. By contrast, aggregate 2023 wheat production was estimated at a below-average level for the second consecutive year, primarily owing to the drought-affected harvest in Argentina. In Central America, the 2023 cereal output is expected at a below-average level.

Regarding the 2024 cereal crops, yield prospects remain uncertain, as high probabilities of above and below-average precipitation across key-producing countries are forecast in the March to May period. In Central America, early indications in Mexico point to a pullback in wheat plantings in 2024 due to dry weather conditions.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Below-average 2024 wheat plantings

In **Mexico**, planting of the 2024 main season, mainly irrigated, wheat crop, which accounts for 95 percent of the annual production, was completed in February 2024. Sowings are officially estimated to be about 10 percent below the five-year average due to prolonged dry weather conditions between September 2023 and January 2024 in the key producing northwestern region. For the March to May period, average rainfall amounts are forecast, which are likely to increase the availability of irrigation water, bolstering wheat yield prospects.

In **Mexico**, planting of the 2024 minor season maize crop was nearing completion in February 2024 and the area sown is expected to be about 30 percent below the average, as a result of drought conditions in the main producing state of Sinaloa, in the west of the country. However, average precipitation amounts forecast over Sinaloa State in the March to May period are likely to be favourable for crop development. Drier-than-average weather conditions are forecast in the key producing central areas, raising concerns over planting operations of the main season crop, mainly rainfed, which will take place during the second quarter of 2024. In **El Salvador**, southern **Guatemala**, southern **Honduras** and western **Nicaragua**, all along the Pacific Coast, weather forecasts point to above-average rainfall amounts between March and May 2024, whilst average precipitation amounts are predicted elsewhere in the region. The La Niña phenomenon, which is typically associated with above-average rains in the subregion, is forecast to be a dominant driver of weather conditions during the July to September period. If excessive rains materialize during the crop maturing stages or at harvesting time, this could impair yield potentials.

In **Haiti**, following a dry weather-affected cropping season in 2023, average precipitation amounts are forecast for the March to May 2024 period and this is expected to provide early conducive conditions for the emergence of the 2024 main season maize crops.

Below-average maize outturn in 2023

With almost all of the 2023 maize crops harvested, the subregional 2023 maize production is pegged at 30.4 million tonnes, about 4 percent below the five-year average. In **Mexico**, the largest cereal producing country of the subregion, the 2023 aggregate maize production is officially estimated at 25.8 million tonnes, about 4 percent below the five-year average, as prolonged dry weather conditions curbed maize yields. Elsewhere, despite the localized impact of El Niño-associated rainfall shortages during the first season, maize outputs are expected at above-average levels in **Guatemala** and **Honduras**, and at an average level in **Nicaragua**. In **El Salvador**, although maize production remained at an average level in 2023, dry weather conditions and torrential rains in October pushed production down year-on-year. In **Haiti**, harvesting of the 2023 third season maize crops will conclude in March 2024 and, according to satellite imagery, crop conditions are generally unfavourable in the main producing central areas, reflecting reduced rainfall amounts between December 2023 and January 2024. Aggregate 2023 maize and paddy production is expected at a below-average level due to low plantings and low yields, as farmers struggled to access sufficient agricultural inputs, amid reduced availabilities, elevated prices and a worsening security situation that also impeded access to land. In addition, dry weather conditions affected yields of main season crops. In **the Dominican Republic**, aggregate 2023 paddy output is estimated at 1.1 million tonnes, 4 percent above the five-year average, mostly reflecting excellent yield results.

Cereal imports forecast at high levels in 2023/24

Cereal imports in the subregion are forecast to rise for a third consecutive year, reaching an above-average level of 39.4 million tonnes in the 2023/24 marketing year (September/August), driven by strong demand of yellow maize for feed and wheat for human consumption. In **Mexico**, imports of maize are forecast to be more than 12 percent above the average, reflecting production shortfalls in 2023, and amid increasing demand for feed from a growing poultry sector.

Wholesale prices of maize and red beans down year on year

Prices of maize and red beans generally declined in November and December 2023 with increased seasonal supplies and, in January 2024, they were lower year-on-year.

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
Central America and the Caribbean	3.2	3.6	3.5	37.6	37.2	36.2	2.8	2.6	2.6	43.6	43.5	42.2	-3.0
El Salvador	0.0	0.0	0.0	0.9	0.9	0.9	0.0	0.0	0.0	0.9	0.9	0.9	-4.4
Guatemala	0.0	0.0	0.0	2.0	2.1	2.1	0.0	0.0	0.0	2.1	2.1	2.2	+2.0
Honduras	0.0	0.0	0.0	0.7	0.7	0.7	0.0	0.0	0.0	0.7	0.7	0.8	+0.3
Mexico	3.2	3.6	3.5	32.8	32.4	31.4	0.3	0.2	0.2	36.3	36.3	35.1	-3.3
Nicaragua	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.4	0.8	0.9	0.9	+0.6

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

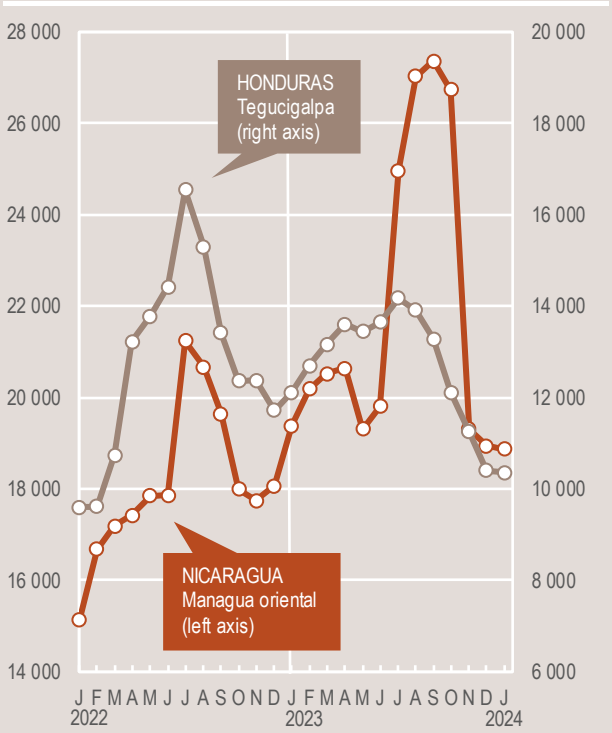
In **Mexico**, prices of maize declined seasonally and were down from a year earlier in January 2024, except in Puebla and Veracruz states where concerns over the impact of dry weather conditions led to an uptick in prices in late 2023 that pushed them to higher year-on-year levels. Regarding black beans, prices in Mexico were above their year-earlier levels in January 2024, supported by the below-average production attained in 2023. While in **Guatemala**, prices of black beans weakened for the third consecutive month in January 2024, as the main harvest improved market availabilities.

In **Haiti**, heightened insecurity is continuing to constrain market operations in urban areas and worsened access to markets. In the capital city, Port-au-Prince, prices of maize meal and black beans in December 2023 remained well above their year-earlier levels due to tight supplies from reduced harvests. Prices of imported rice rose by more than 10 percent in December 2023 alone in several markets, on account of reduced import quantities during the second half of 2023. Prices of other imported food items such as vegetable oils and wheat flour were generally steady in most markets, in part owing to a stable national currency, the gourde, against the United States dollar during the last quarter of 2023.

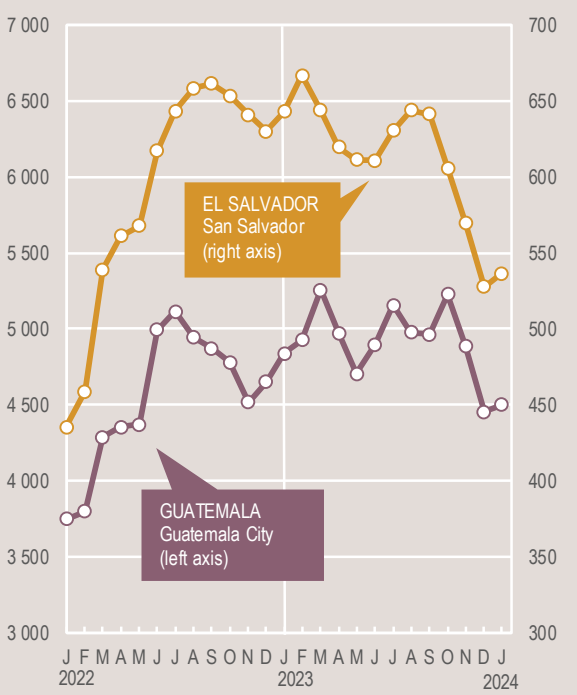
In Haiti, 4.4 million people face acute food insecurity between March and June 2024

Acute food insecurity in **Haiti** has remained at high levels since 2018 due to sluggish economic growth, low agricultural production and frequent natural disasters, exacerbated by persistent political instability and heightened insecurity. According to the latest IPC analysis, about 4.4 million people are projected to face acute food insecurity between March and June 2024, down from 4.9 million people in the prior year. The yearly improvement is largely due to humanitarian assistance provided between August 2023 and February 2024. In **the Dominican Republic**, about 1.1 million people, 10 percent of analysed population, are estimated to face acute food insecurity between December 2023 and April 2024, down from 1.2 million people in the March to June 2023 period. Despite the year-on-year decline, which is based on an increase in the minimum wage and increasing employment opportunities, high food prices continue to constrain economic access to food.

Wholesale white maize prices in selected Central America countries



Wholesale white maize prices in selected Central America countries



SOUTH AMERICA

Mixed prospects for 2024 maize production

The 2024 maize crop is at different development stages and the harvest period is set to commence in March 2024 in southern parts of the subregion. In **Argentina** and **Uruguay**, the 2024 maize outputs are expected to rebound from the dry weather-reduced harvests in 2023, mostly driven by above-average areas. In **Brazil**, harvesting of the 2024 first minor season maize crops is underway and a below-average output is expected, due to excessive rains that reduced plantings in the key producing southern region. Planting of the 2024 main season maize crops, which represents 75 percent of the annual production, is expected to conclude in March, and early indications point to above-average plantings, albeit 8 percent down from the previous year. The year-on-year area contraction is driven by lower maize prices, a shortened planting window due to soybean harvest delays and concerns over forecast dry weather conditions from April to June 2024. In **the Plurinational State of Bolivia** and **Paraguay**, dry weather conditions at planting time also kept 2024 maize plantings at below-average levels. In **Chile**, maize plantings continue to decline and the area sown in 2024 is estimated at a record low level due to a sustained shift to more profitable horticultural crops. In **Ecuador** and **Peru**, despite generally favourable weather conditions at planting time, lower maize prices have led to a contraction in plantings of the first season maize crop. In all the aforementioned countries, except Brazil, dry weather conditions are forecast between March and May 2024, raising concerns over both yield potentials and plantings of the 2024 second season maize crops. By contrast, if above-average rainfall forecasts occur in **the Bolivarian Republic of Venezuela** and coastal areas of **Colombia**, they could hamper planting operations of the 2024 second maize crop, taking place between February and July.

Harvesting of the 2024 paddy crops is about to start in March 2024. In **Brazil**, official forecasts indicate an average harvest of 10.8 million tonnes in 2024, with good yields expected to compensate for below-average plantings. In **Uruguay**, sowings were estimated to be near average, but fell below the initial expectations due to low availabilities of irrigation water at planting time. In **Colombia**, the planted area to the 2024 minor paddy crop is also estimated at an average level, while above-average sowings are expected in the current main season in **Ecuador** and **Peru**, on account of high prices. In the above-mentioned five countries, crop conditions were favourable, as of mid-February.

Above-average cereal production in 2023 boosts export potential

Subregional 2023 cereal output reached a near-record level of 253.7 million tonnes, primarily driven by large plantings in **Brazil**. Cereal exports in the 2023/24 marketing year are expected at an above-average level of 99.5 million tonnes, although 4 percent less than in 2022/23 due to reduced exportable surplus in **Argentina** following drought conditions in 2023 that reduced the country's cereal outturn. Rice exports in 2023 are estimated at an above-average level of 3.6 million tonnes, despite a below-average aggregate paddy output. Regarding wheat, exports are expected to remain at a below-average level for the second consecutive marketing year, as a result of the below-average production in 2023.

Table 16. South America cereal production

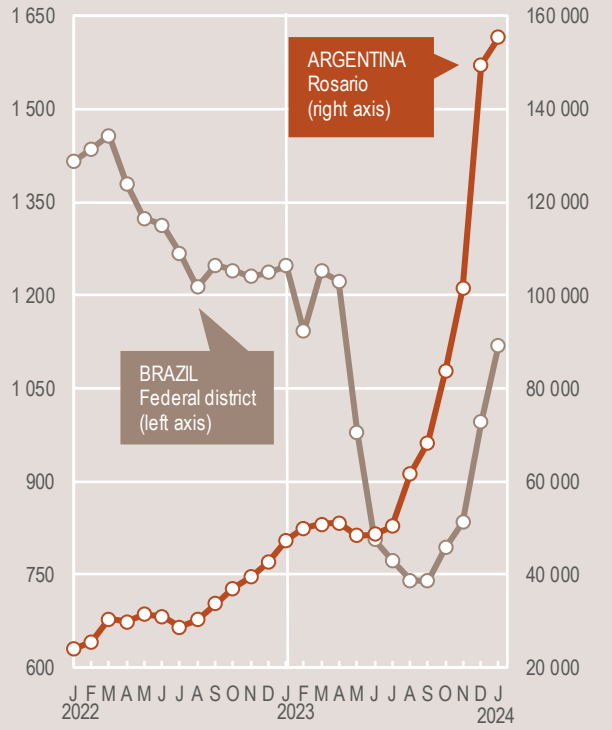
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
South America	29.1	27.5	27.7	181.0	202.7	202.3	24.8	24.3	23.8	234.9	254.4	253.7	-0.3
Argentina	18.3	12.6	15.5	63.3	67.0	48.5	1.3	1.2	1.2	82.9	80.8	65.1	-19.4
Brazil	7.0	10.6	8.1	100.5	117.8	138.1	11.3	10.8	10.0	118.8	139.1	156.2	+12.3
Chile	1.3	1.3	1.3	1.5	1.2	1.1	0.2	0.1	0.1	3.0	2.6	2.5	-2.0
Colombia	0.0	0.0	0.0	1.4	1.5	1.6	2.8	2.6	2.9	4.2	4.2	4.4	+7.0
Peru	0.2	0.2	0.2	1.8	1.9	1.9	3.4	3.4	3.3	5.4	5.5	5.4	-2.9

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

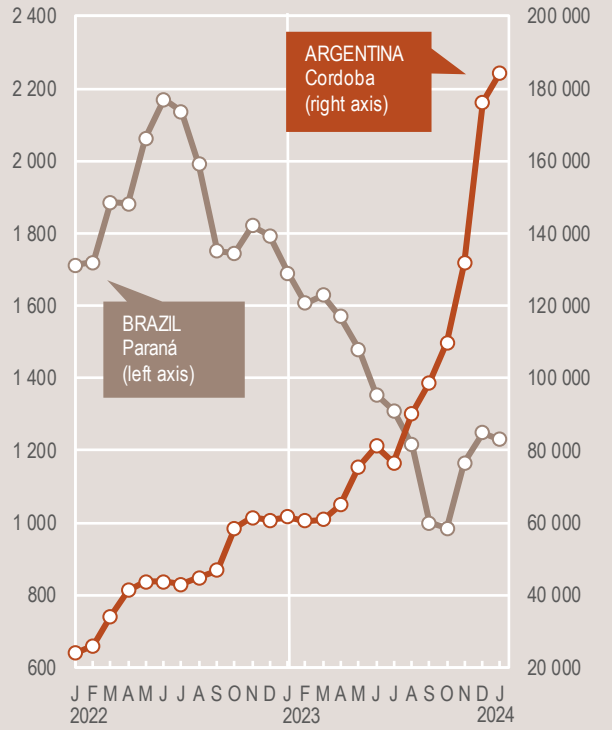
Wholesale maize prices in selected countries in South America

(Brazilian real/tonne) (Argentine peso/tonne)



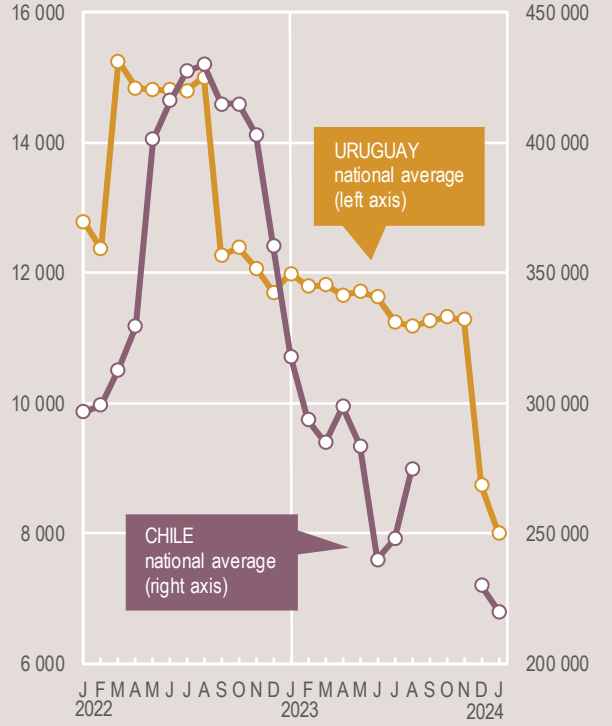
Wholesale wheat prices in selected countries in South America

(Brazilian real/tonne) (Argentine peso/tonne)



Wholesale wheat prices in selected countries in South America

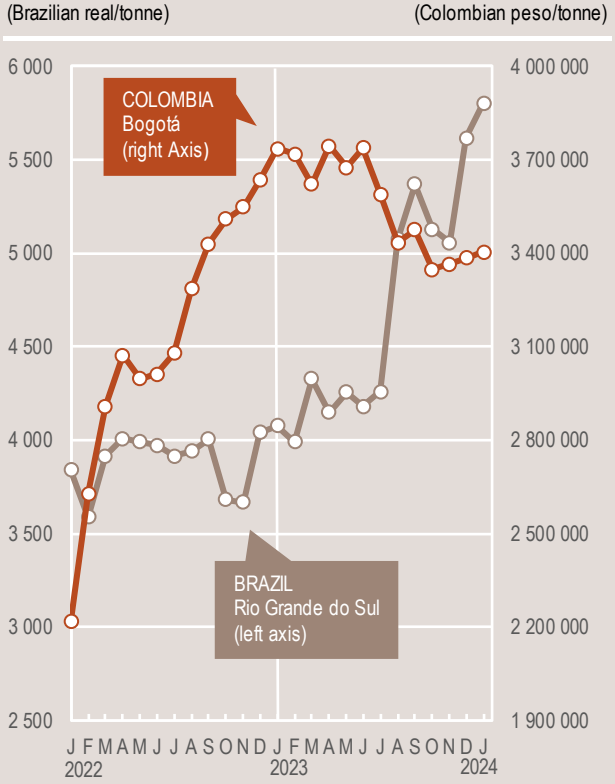
(Uruguayan peso/tonne) (Chilean peso/tonne)



Lower year-on-year maize and wheat prices

In most countries of the subregion, as of January 2024, prices of yellow maize and wheat were lower year-on-year. A notable exception were prices of maize and wheat in **Argentina**, which were well above their year-earlier levels, reflecting below-average outputs of both crops in 2023 and the 54 percent devaluation of the Argentine peso in December 2023. Prices of yellow maize in **Paraguay** were higher year-on-year in January due to the 2023 below-average harvest. Prices of yellow maize showed mixed trends between November 2023 and January 2024, and were down from a year earlier in **Brazil**, **Colombia**, **Ecuador**, **Peru** and **Uruguay**. During the same period, prices of wheat declined seasonally in **Uruguay**, while they rose in most markets of **Brazil** due to concerns over the impact of excessive rains on the 2023 harvest. In importing countries, prices of wheat flour weakened in **Colombia** and **Peru**, while they slightly strengthened in **Ecuador**, due to lower year-on-year import levels during the last quarter of 2023. Prices of rice were above their 2023 January levels in **Brazil**, **Ecuador**, **Paraguay** and **Peru** primarily due to tight supplies following reduced 2023 outputs. In **Uruguay**, rice prices were also higher year-on-year in January reflecting high international quotations. By contrast, rice prices were down from a year earlier in **Colombia**, on account of the above-average harvest in 2023.

Wholesale rice prices in selected countries in South America

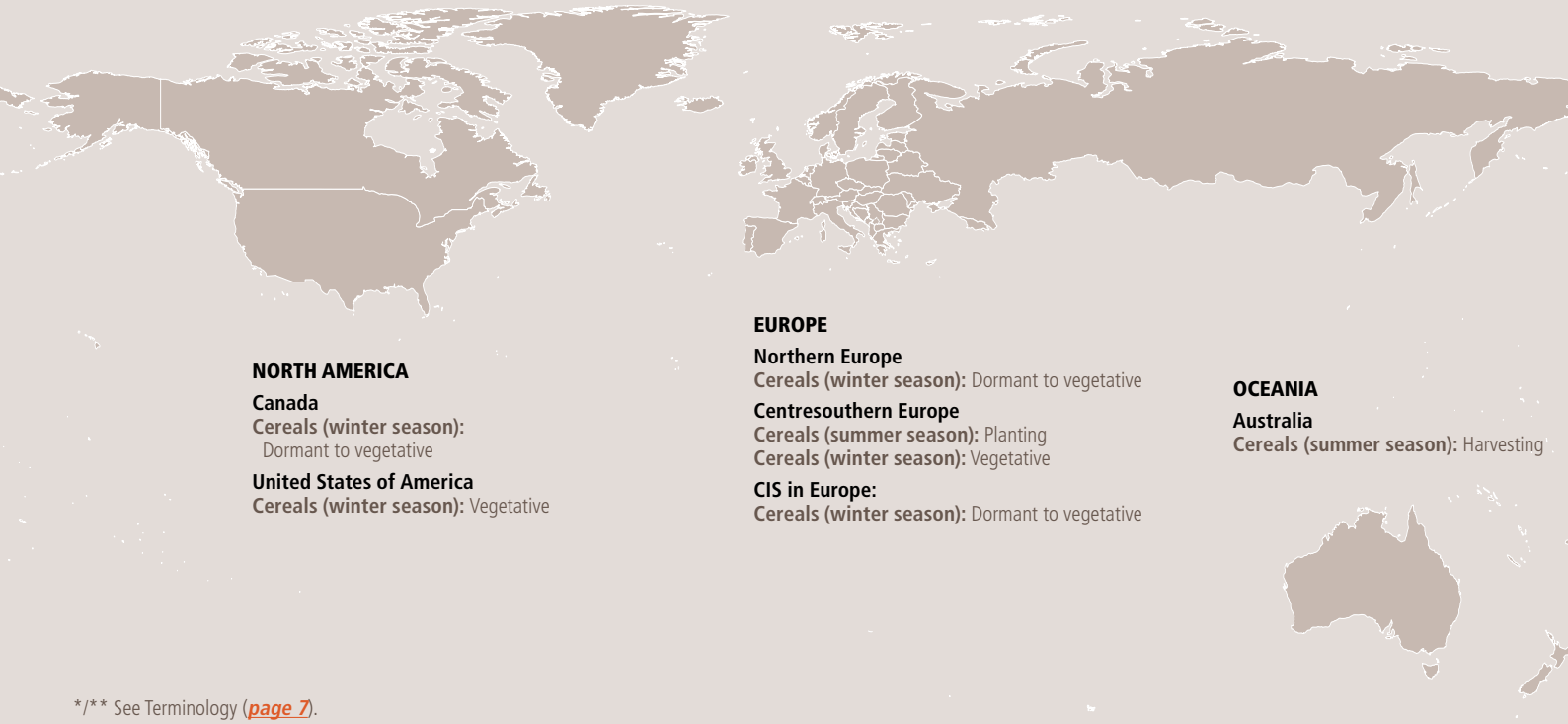


About 2 million Venezuelans in need of food assistance in 2024

According to the 2024 Humanitarian Response Plan for **the Bolivarian Republic of Venezuela**, about 2 million people are estimated to be in need of food assistance, unchanged from 2023. Despite some economic recovery since 2021, outflows of refugees and migrants continued in 2023 due to the lingering effects of the severe and prolonged macroeconomic crisis between 2014 and 2020, and the continuing excessively high inflation rates, estimated at 190 percent in 2023. According to the most recent data available, the number of refugees and migrants from the country was estimated at 7.7 million at the end of 2023, up from 7.1 million a year before. The data indicated that the majority of refugees found shelter in Colombia (2.88 million), Peru (1.54 million), Brazil (0.51 million), Ecuador (0.47 million) and Chile (0.44 million).

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of February 2024
Territories/boundaries**



NORTH AMERICA

Canada
Cereals (winter season): Dormant to vegetative

United States of America
Cereals (winter season): Vegetative

EUROPE

Northern Europe
Cereals (winter season): Dormant to vegetative

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

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

OCEANIA

Australia
Cereals (summer season): Harvesting

*/** See Terminology (*page 7*).

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 1.* Cited 8 March 2024, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

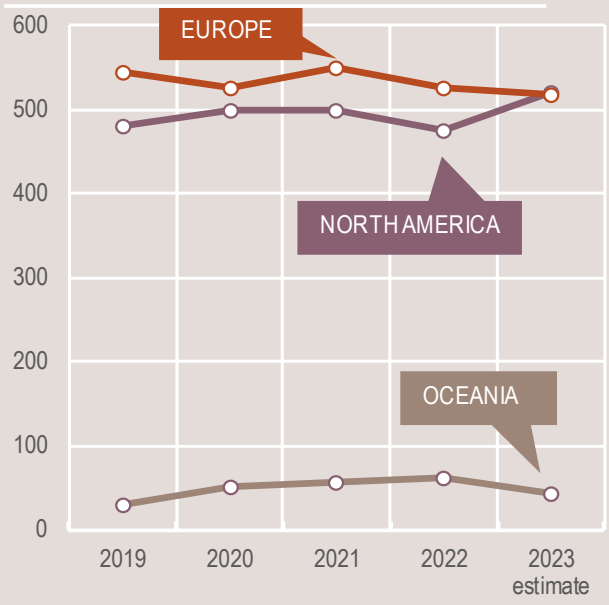
Production Overview

In the United States of America, winter wheat plantings dipped, amid relatively low prices, but the total wheat harvested area and yields may surpass the average reflecting mostly beneficial weather conditions in 2024. In Canada, despite an anticipated pullback in wheat plantings due to softer prices, an expected return to trend yields underlie an overall good production outlook in 2024. In the European Union, winter wheat plantings declined, amid heavy rains, and production is foreseen to fall marginally in 2024.

In Ukraine, a further drop in wheat area is expected in 2024 due to the continuing pervasive impacts of the war. In the Russian Federation, winter wheat production in 2024 is forecast to increase compared the previous year, largely resting on good yield prospects.

In Oceania, following two consecutive bumper outputs in Australia, wheat production fell sharply in 2023 because of dry and hot weather conditions that reduced yields.

Cereal production
(million tonnes)



NORTH AMERICA

Low wheat prices expected to push down plantings in 2024

In **the United States of America**, although still remaining above the five-year average, lower wheat prices have elicited a 6 percent year-on-year decline in winter wheat plantings in 2024. Nevertheless ample precipitation amounts since the last quarter of 2023, following two consecutive years of widespread drought conditions, boosted yield prospects and raised expectations that the harvested area may actually exceed the level of 2023. Total wheat production is tentatively pegged at 51.5 million tonnes in 2024, both above the recent five-year average and 2023's output.

Planting of coarse grain crops is expected to start in April 2024 and preliminary forecasts indicate that maize output could reach an above-average level of 382 million tonnes in 2024. The expected output is moderately below the record high attained in 2023, mostly due to a foreseen pullback in maize plantings in response to large stocks and weaker prices.

In **Canada**, the bulk of the wheat crop will be planted between May and June 2024. Reflecting softer prices, official projections indicate a 2 percent decrease in total wheat plantings in 2024, although the area is still expected to remain above the five-year average. Weather forecasts point to a high probability of above-normal rainfall amounts from March until the planting period in May, conditions that are likely to reduce soil moisture deficits that affected wheat crops in 2023. Assuming favourable weather conditions for the season, wheat yields are expected to increase in 2024 compared to 2023, which is underlying preliminary expectations of an above-average wheat output of 33 million tonnes in 2024.

EUROPE

Winter wheat plantings in 2024 declined slightly in the European Union, amid heavy rains

In **the European Union**, planting of the 2024 minor spring wheat crop is underway; the major winter wheat crop was planted late last year. The aggregate planted area with the 2024 wheat crop is forecast to decline moderately compared to the previous year, mainly due to heavy rains that disrupted and delayed sowing of the winter crop, particularly in key producing countries **France** and **Germany**. A cold spell in the Baltic Sea Region in December 2023 also caused some frost damage to standing crops, while rainfall deficits persisted in southern **Spain** and parts of **Italy**, following drier-than-normal conditions in 2023.

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	5-year average	2022	2023 est.	Change: 2023/2022 (%)
North America	80.1	79.2	81.3	400.6	387.4	430.5	9.0	7.3	9.9	489.7	473.9	521.6	+10.1
Canada	31.4	34.3	32.0	28.1	30.6	27.2	0.0	0.0	0.0	59.6	65.0	59.2	-8.9
United States of America	48.7	44.9	49.3	372.4	356.7	403.2	9.0	7.3	9.9	430.1	408.9	462.4	+13.1
Europe	263.0	282.8	271.2	262.2	240.4	243.8	3.8	3.1	3.3	529.1	526.2	518.4	-1.5
Belarus	2.4	2.4	2.3	4.7	4.7	4.9	0.0	0.0	0.0	7.0	7.1	7.2	+1.7
European Union[I]	138.5	134.4	134.0	153.9	134.9	137.5	2.7	2.2	2.2	295.2	271.4	273.7	+0.8
Russian Federation[II]	82.6	104.2	92.8	42.0	47.8	43.4	1.1	0.9	1.1	125.6	152.9	137.2	-10.3
Serbia	3.0	3.1	3.0	7.2	5.1	7.3	0.0	0.0	0.0	10.2	8.3	10.3	+24.9
Ukraine[III]	26.1	20.7	22.5	43.8	34.8	37.5	0.0	0.0	0.0	70.0	55.5	60.0	+8.1
Oceania	28.6	41.0	25.9	16.6	19.7	15.8	0.4	0.7	0.5	45.5	61.4	42.2	-31.2
Australia	28.2	40.5	25.5	15.9	19.1	15.2	0.4	0.7	0.5	44.5	60.3	41.2	-31.7

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

[I] 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.

[II] Information provided by the Russian Federation includes statistical data for the Autonomous Republic of Crimea and the city of Sevastopol, Ukraine, temporarily occupied by the Russian Federation and is presented without prejudice t relevant UN General Assembly and UN Security Council resolutions, including UN General Assembly resolution 68/262 of 27 March 2014 and UN Security Council resolution 2202 (2015) of 17 February 2015, which reaffirm the territorial integrity of Ukraine.

[III] Information provided by Ukraine excludes statistical data concerning the Autonomous Republic of Crimea, the city of Sevastopol and certain areas of the Donetsk and Luhansk regions. The information is presented without prejudice t relevant UN General Assembly and UN Security Council resolutions, including UN General Assembly resolution 68/262 of 27 March 2014 and UN Security Council resolution 2202 (2015) of 17 February 2015, which reaffirm the territorial integrity of Ukraine.

Based on less-than-favourable weather conditions and a small decline in the area sown, wheat production in 2024 is expected to decrease slightly from last year's below-average level.

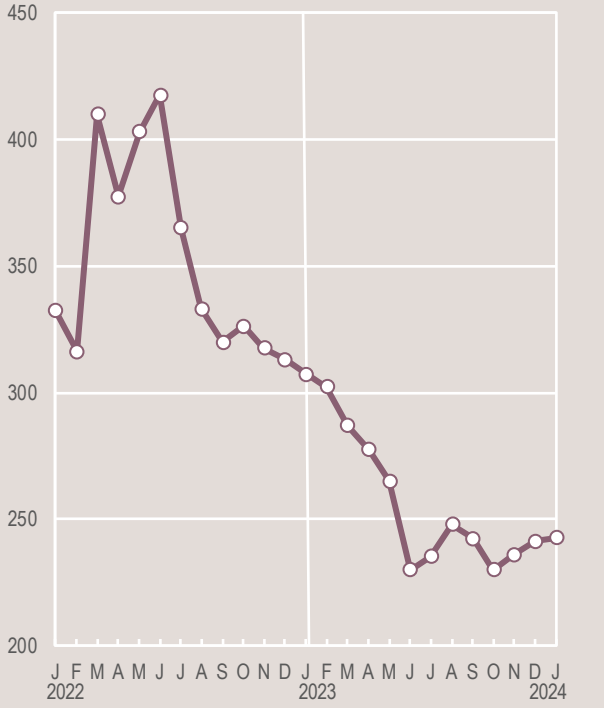
Winter wheat production expected to increase marginally in the Russian Federation in 2024

In **the Russian Federation** and **Ukraine**, planting of 2024 winter cereal crops, currently dormant and to be harvested from June 2024 onwards, was completed in November 2023. The sown area in Ukraine is estimated to have fallen further in 2024 as the war continues to obstruct access to fields, whilst severe financial constraints and infrastructure damages limit the profitability of wheat production. In **the Russian Federation**, winter wheat production in 2024 is forecast to increase compared to the previous year, largely resting on good yield prospect that reflect favourable weather forecasts between February and June 2024. In **the Republic of Moldova** and **Belarus**, weather conditions since the planting period, which was also completed in November 2023, have been mostly beneficial for crops.

Ukraine cereal production estimated at a below-average level in 2023

In **Ukraine**, 2023 cereal production is estimated at a below-average level due to the impact of the war, which severely hampered crop production and marketing activities. However, largely owing to fortuitous weather conditions, yields increased in 2023 and helped to push up wheat production by 10 percent year-on-year. In **the Russian Federation**, wheat production is officially estimated at 92.7 million tonnes, below the previous year's record high harvest, but above the five-year average as conducive weather conditions kept yields at above-average levels. In **the Republic of Moldova**, despite increasing in 2023, cereal production is estimated below the five year average.

Wheat export prices in the Russian Federation
(United States dollar/tonne)



Bulk of Ukrainian agricultural commodities exported via sea ports

In **Ukraine**, with the implementation of a humanitarian corridor in the second half of 2023, maritime export flows, previously curtailed following the cessation of the Black Sea Grain Initiative in July 2023, have largely been restored. Considering recurring challenges in the neighbouring countries, most of Ukrainian exports are seaborne. In January 2024, Ukraine exported 6.4 million tonnes of agricultural commodities, including oilseeds, out of which about 5.5 million tonnes were shipped via seaports. In January 2023, out of 5.4 million tonnes of agricultural commodities, about 4 million tonnes were exported via seaports. Considering the current pace of exports, it is forecast that Ukrainian cereal exports could reach about 43 million tonnes, about 14 percent below previous year's export quantity, although a revision is likely depending on logistical conditions.

In **the Russian Federation**, cereal exports are forecast at 63 million tonnes in 2023/24, about 20 percent above the level in 2022/23, and over 35 percent above the five-year average, supported by high levels of domestic production and significant carryover stocks. Lack of officially reported trade data remains a constraint to a detailed analysis.

Russian export prices of wheat down 20 percent year-on-year

Export prices for milling wheat from **the Russian Federation** remained almost unchanged between September 2023 and January 2024, but were down by 20 percent year-on-year, as ample supplies weighed on prices. In **Ukraine**, export prices of milling wheat marginally increased in January 2024, as exports via the Black Sea Humanitarian Corridor continued; compared to previous years, prices were unchanged. In **the Republic of Moldova**, national average retail prices of wheat flour decreased by 10 percent in the year to January 2024. In **Belarus**, national average retail prices of wheat flour slightly decreased between October 2023 and January 2024, but were still 7 percent above their year-earlier levels, reflecting increased transport and production costs.

About 17.6 million people in need of humanitarian assistance in Ukraine

According to the 2024 HNO, about 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2024. As of December 2023, about 3.7 million people were estimated to be displaced in the country according to data from the International Organization for Migration (IOM).

OCEANIA

Rainfall shortages cause a slump in 2023 wheat yields

Harvesting of the 2023 winter wheat and barley crops recently concluded. On account of persistent dry weather conditions in key northern growing areas, linked to the ongoing El Niño event, 2023 wheat yields declined to low levels. As a result, total wheat production is estimated at a below-average level of 25.5 million tonnes. Similarly, a downturn in barley yields caused production to fall to a below-average level of 10.8 million tonnes. The early outlook for the 2024 cereal crop is more favourable, buoyed by a likely return of La Niña event, which is typically associated with increased rainfall amounts.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	5-year average (2018/19 – 2022/23)	2019/20	2020/21	2021/22	2022/23	2023/24
Ratio of world stocks to utilization (%)						
Wheat	*38.4*	*37.8*	*38.3*	*38.4*	*40.7*	*39.9*
Coarse grains	*24.3*	*24.2*	*23.4*	*24.7*	*23.5*	*24.4*
Rice	*37.3*	*36.9*	*37.2*	*37.5*	*37.5*	*37.7*
Total cereals	***30.6***	***30.3***	***30.1***	***30.9***	***30.9***	***31.1***
Ratio of major cereal exporters' supplies to market requirements (%)[I]	*116.4*	*118.5*	*115.2*	*114.8*	*116.9*	*117.9*
Ratio of major exporters' stocks to their total disappearance (%)[II]						
Wheat	*17.3*	*15.6*	*15.4*	*16.4*	*20.9*	*20.4*
Coarse grains	*13.4*	*14.3*	*11.5*	*13.1*	*12.4*	*14.2*
Rice	*27.0*	*26.1*	*28.5*	*28.4*	*29.3*	*30.7*
Total cereals	***19.2***	***18.7***	***18.4***	***19.3***	***20.9***	***21.8***

	Average growth rate 2013–2022	2019	2020	2021	2022	2023
Annual growth in world cereal production (%)	*1.0*	*2.5*	*2.7*	*1.1*	*-0.1*	*1.1*
Annual growth in cereal production in the LIFDCs (%)	*1.5*	*2.3*	*5.5*	*-7.5*	*3.1*	*0.3*

	2021	2022	2023	2024*	Change 2024* over 2023*
Selected cereal price indices[III]					
Wheat	*132.1*	*164.9*	*127.3*	*111.6*	*-23.2%*
Maize	*144.8*	*169.5*	*134.4*	*108.6*	*-32.8%*
Rice	*105.8*	*108.8*	*132.0*	*141.7*	*12.6%*

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).

[I] 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.

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

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

*January–February average.

Table A2. World cereal stocks

(million tonnes)

	2019	2020	2021	2022	2023 est.	2024 f'cast
TOTAL CEREALS	***838.0***	***836.7***	***842.6***	***863.1***	***872.9***	***896.9***
Wheat	***276.0***	***287.6***	***296.5***	***299.4***	***323.2***	***318.9***
held by:						
- main exporters[I]	*71.3*	*63.3*	*60.9*	*64.0*	*84.6*	*82.0*
- others	*204.7*	*224.3*	*235.6*	*235.4*	*238.6*	*236.9*
Coarse grains	***374.9***	***361.1***	***351.2***	***367.0***	***353.4***	***379.3***
held by:						
- main exporters[I]	*128.2*	*122.8*	*100.4*	*114.1*	*106.0*	*122.6*
- others	*246.7*	*238.3*	*250.8*	*252.9*	*247.4*	*256.7*
Rice (milled basis)	***187.0***	***188.0***	***194.9***	***196.8***	***196.3***	***198.7***
held by:						
- main exporters[I]	*39.6*	*45.8*	*52.4*	*55.6*	*58.2*	*61.6*
- others	*147.4*	*142.2*	*142.5*	*141.2*	*138.1*	*137.1*
Developed countries	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Australia	*6.6*	*4.2*	*5.4*	*7.9*	*10.5*	*7.5*
Canada	*9.4*	*9.5*	*9.7*	*7.5*	*7.3*	*7.4*
European Union[II]	*41.0*	*41.7*	*36.1*	*42.8*	*45.6*	*42.2*
Japan	*6.6*	*6.9*	*7.0*	*7.1*	*6.9*	*6.8*
Russian Federation	*15.3*	*13.6*	*17.6*	*18.1*	*40.1*	*40.3*
South Africa	*3.7*	*2.7*	*4.0*	*4.7*	*4.9*	*4.8*
Ukraine	*7.7*	*5.6*	*5.9*	*23.2*	*11.5*	*11.3*
United States of America	*91.7*	*83.0*	*58.4*	*57.1*	*53.6*	*77.2*
Developing countries	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Asia	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
China (mainland)	*387.3*	*384.5*	*393.0*	*397.4*	*400.2*	*410.2*
India	*51.3*	*63.5*	*68.3*	*65.9*	*65.3*	*70.0*
Indonesia	*11.5*	*9.6*	*7.8*	*8.0*	*6.7*	*7.8*
Iran (Islamic Republic of)	*9.2*	*10.0*	*11.3*	*12.0*	*12.1*	*11.8*
Pakistan	*3.5*	*2.1*	*4.6*	*5.8*	*5.2*	*4.4*
Philippines	*5.5*	*4.5*	*4.6*	*4.8*	*3.8*	*3.4*
Republic of Korea	*3.8*	*4.6*	*4.5*	*4.9*	*4.7*	*5.0*
Syrian Arab Republic	*2.2*	*3.2*	*4.2*	*2.6*	*1.0*	*1.2*
Türkiye	*6.6*	*10.1*	*10.5*	*9.2*	*12.8*	*9.9*
Africa	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Algeria	*6.6*	*6.7*	*6.3*	*5.0*	*5.3*	*5.4*
Egypt	*6.3*	*6.3*	*6.0*	*6.0*	*5.0*	*4.6*
Ethiopia	*6.2*	*7.1*	*7.2*	*6.8*	*6.6*	*6.0*
Morocco	*7.3*	*5.8*	*3.6*	*5.7*	*4.0*	*4.9*
Nigeria	*3.2*	*2.9*	*2.5*	*2.3*	*2.0*	*1.2*
Tunisia	*1.0*	*1.2*	*1.0*	*1.0*	*1.1*	*1.0*
Central America and the Caribbean	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Mexico	*7.6*	*7.4*	*6.9*	*8.0*	*8.1*	*8.2*
South America	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Argentina	*12.6*	*12.7*	*11.0*	*8.1*	*12.0*	*8.0*
Brazil	*16.9*	*16.7*	*17.5*	*13.9*	*8.7*	*11.9*

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

[I] 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.

[II] 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[I]	US Soft Red Winter No.2[II]	Argentina Trigo Pan[III]	US No.2 Yellow[II]	Argentina[III]	US Gulf
Annual (July/June)						
2009/10	209	185	224	160	168	167
2010/11	316	289	311	254	260	258
2011/12	300	256	264	281	269	286
2012/13	348	310	336	311	278	304
2013/14	318	265	335	217	219	244
2014/15	266	221	246	173	177	247
2015/16	211	194	208	166	170	192
2016/17	197	170	190	156	172	172
2017/18	230	188	203	159	165	190
2018/19	232	210	233	166	166	183
2019/20	220	219	231	163	163	190
2020/21	269	254	263	220	225	308
2021/22	399	343	348	288	275	279
2022/23	348	267	340	260	263	307
Monthly						
2022 - February	390	339	312	293	288	344
2022 - March	486	447	412	336	336	404
2022 - April	495	427	420	348	316	402
2022 - May	521	441	467	346	315	389
2022 - June	460	380	480	336	299	373
2022 - July	383	311	425	306	271	325
2022 - August	383	315	408	294	281	318
2022 - September	419	344	403	313	294	360
2022 - October	439	352	422	344	308	371
2022 - November	423	336	415	321	301	367
2022 - December	387	315	394	302	312	361
2023 - January	380	314	375	303	311	365
2023 - February	395	308	364	298	313	363
2023 - March	370	283	349	285	299	343
2023 - April	378	278	345	291	285	342
2023 - May	365	248	366	267	253	307
2023 - June	346	260	358	268	238	292
2023 - July	344	257	336	238	227	277
2023 - August	318	235	322	209	221	243
2023 - September	315	231	313	224	237	247
2023 - October	297	238	302	224	243	268
2023 - November	283	241	251	208	213	271
2023 - December	290	257	248	204	217	269
2024 - January	284	248	245	197	209	255
2024 - February	279	246	233	189	191	239

[I] Delivered United States of America f.o.b. Gulf.

[II] Delivered United States of America Gulf.

[III] Up River f.o.b.

Table A4a. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023 or 2023

(thousand tonnes)

		2021/22 or 2022	2022/23 or 2023
	Marketing year	Total imports	Total imports
AFRICA		***29 709.8***	***29 052.0***
East Africa		***14 547.6***	***13 901.2***
Burundi	Jan/Dec	*199.9*	*212.0*
Comoros	Jan/Dec	*70.8*	*82.0*
Eritrea	Jan/Dec	*459.7*	*470.0*
Ethiopia	Jan/Dec	*1 815.0*	*1 765.0*
Kenya	Oct/Sept	*4 358.6*	*4 596.6*
Rwanda	Jan/Dec	*282.6*	*382.6*
Somalia	Aug/Jul	*1 070.0*	*1 195.0*
South Sudan	Nov/Oct	*880.0*	*730.0*
Sudan	Nov/Oct	*3 599.0*	*2 690.0*
Uganda	Jan/Dec	*897.0*	*718.0*
United Republic of Tanzania	Jun/May	*915.0*	*1 060.0*
Southern Africa		***3 092.0***	***3 310.6***
Lesotho	Apr/Mar	*158.7*	*201.6*
Madagascar	Apr/Mar	*915.5*	*1 081.5*
Malawi	Apr/Mar	*150.0*	*147.2*
Mozambique	Apr/Mar	*1 482.9*	*1 355.9*
Zimbabwe	Apr/Mar	*384.9*	*524.4*
West Africa		***9 144.3***	***9 166.6***
Coastal Countries		***3 330.8***	***3 374.0***
Benin	Jan/Dec	*682.0*	*769.0*
Guinea	Jan/Dec	*1 226.3*	*1 255.5*
Liberia	Jan/Dec	*374.0*	*369.0*
Sierra Leone	Jan/Dec	*583.0*	*505.0*
Togo	Jan/Dec	*465.5*	*475.5*
Sahelian Countries		***5 813.5***	***5 792.6***
Burkina Faso	Nov/Oct	*582.9*	*584.0*
Chad	Nov/Oct	*212.6*	*217.6*
Gambia	Nov/Oct	*299.7*	*417.0*
Guinea-Bissau	Nov/Oct	*83.0*	*123.0*
Mali	Nov/Oct	*606.0*	*751.0*
Mauritania	Nov/Oct	*372.0*	*500.0*
Niger	Nov/Oct	*521.0*	*389.0*
Senegal	Nov/Oct	*3 136.3*	*2 811.0*
Central Africa		***2 925.9***	***2 673.6***
Cameroon	Jan/Dec	*1 532.0*	*1 340.0*
Congo	Jan/Dec	*374.9*	*383.0*
Central African Republic	Jan/Dec	*80.3*	*75.0*
Democratic Republic of the Congo	Jan/Dec	*914.2*	*852.5*
Sao Tome and Principe	Jan/Dec	*24.5*	*23.1*

Notes: 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 International Development Association (IDA) assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023 or 2023

(thousand tonnes)

		2021/22 or 2022	2022/23 or 2023
	Marketing year	Total imports	Total imports
ASIA		***17 901.2***	***18 132.5***
Central Asia		***5 052.9***	***5 866.6***
Kyrgyzstan	Jul/Jun	*493.5*	*427.6*
Tajikistan	Jul/Jun	*1 070.0*	*1 142.0*
Uzbekistan	Jul/Jun	*3 489.4*	*4 297.0*
Far East		***5 391.3***	***4 800.9***
Afghanistan	Jul/Jun	*3 774.0*	*3 824.0*
Democratic People's Republic of Korea	Nov/Oct	*	*
Nepal	Jul/Jun	*1 617.3*	*976.9*
Near East		***7 457.0***	***7 465.0***
Syrian Arab Republic	Jul/Jun	*2 782.0*	*2 720.0*
Yemen	Jan/Dec	*4 675.0*	*4 745.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 447.0***	***1 435.4***
Haiti	Jul/Jun	*676.7*	*722.9*
Nicaragua	Jul/Jun	*770.3*	*712.5*
TOTAL		***49 058.0***	***48 619.9***

Notes: 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 International Development Association (IDA) assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

* Estimates not available.

Table A5. Estimated cereal import requirements of low-income food-deficit countries in 2023/2024

(thousand tonnes)

		2022/23	2023/24
	Marketing year	Total imports	Total import requirements
AFRICA		***19 374.8***	***20 606.1***
East Africa		***10 271.6***	***11 860.9***
Kenya	Oct/Sept	***4 596.6***	***4 635.9***
Somalia	Aug/Jul	*1 195.0*	*1 020.0*
South Sudan	Nov/Oct	*730.0*	*700.0*
Sudan	Nov/Oct	*2 690.0*	*4 205.0*
United Republic of Tanzania	Jun/May	*1 060.0*	*1 300.0*
Southern Africa		***3 310.6***	***3 184.2***
Lesotho	Apr/Mar	*201.6*	*219.6*
Madagascar	Apr/Mar	*1 081.5*	*641.0*
Malawi	Apr/Mar	*147.2*	*150.5*
Mozambique	Apr/Mar	*1 355.9*	*1 561.0*
Zimbabwe	Apr/Mar	*524.4*	*612.1*
West Africa		***5 792.6***	***5 561.0***
Burkina Faso	Nov/Oct	*584.0*	*599.0*
Chad	Nov/Oct	*217.6*	*236.0*
Gambia	Nov/Oct	*417.0*	*380.0*
Guinea-Bissau	Nov/Oct	*123.0*	*144.0*
Mali	Nov/Oct	*751.0*	*596.0*
Mauritania	Nov/Oct	*500.0*	*551.0*
Niger	Nov/Oct	*389.0*	*444.0*
Senegal	Nov/Oct	*2 811.0*	*2 611.0*
ASIA		***13 387.5***	***12 850.4***
Central Asia		***5 866.6***	***5 275.6***
Kyrgyzstan	Jul/Jun	*427.6*	*366.6*
Tajikistan	Jul/Jun	*1 142.0*	*1 247.0*
Uzbekistan	Jul/Jun	*4 297.0*	*3 662.0*
Far East		***4 800.9***	***4 849.8***
Afghanistan	Jul/Jun	*3 824.0*	*3 354.0*
Nepal	Jul/Jun	*976.9*	*1 495.8*
Near East		***2 720.0***	***2 725.0***
Syrian Arab Republic	Jul/Jun	*2 720.0*	*2 725.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 435.4***	***1 472.0***
Haiti	Jul/Jun	*722.9*	*737.0*
Nicaragua	Jul/Jun	*712.5*	*735.0*
TOTAL		***34 197.7***	***34 928.5***

Notes: Countries included in this table are only those that have entered the new marketing year. The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

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Crop Prospects and Food Situation is published by the Markets and Trade Division of FAO under the Global Information and Early Warning System on Food and Agriculture (GIEWS). It is published four times a year and focuses on developments affecting the food situation of developing countries and low-income food-deficit countries (LIFDCs) in particular. The report provides a review of the food situation by geographic region, a section dedicated to the LIFDCs and a list of countries requiring external assistance for food. It also includes a global Cereal supply and demand overview to complement the biannual analysis in the **Food Outlook** publication. **Crop Prospects and Food Situation** is available in English, French and Spanish in electronic format.

The data used to create the charts and tables are taken from the following sources:

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This report is based on information available as of **February 2024.**

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ISBN 978-92-5-138629-3 ISSN 2707-2223

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CD0022EN/1/03.24