Food and Agriculture Organization of the United Nations

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CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

45

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 45 countries, including 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. Multi-year high inflation rates continue to aggravate food insecurity conditions, particularly in low-income food-deficit countries. Conflicts and extreme weather events remain the key drivers of severe acute food insecurity across the globe, with particular concerns for countries in East and West Africa.

Asia	-0.3
Africa	-4.1
Central America and the Caribbean	-3.9
South America	+7.5
North America	-3.3
Europe	-7.3
Oceania	-8.6
World	**-2.0**

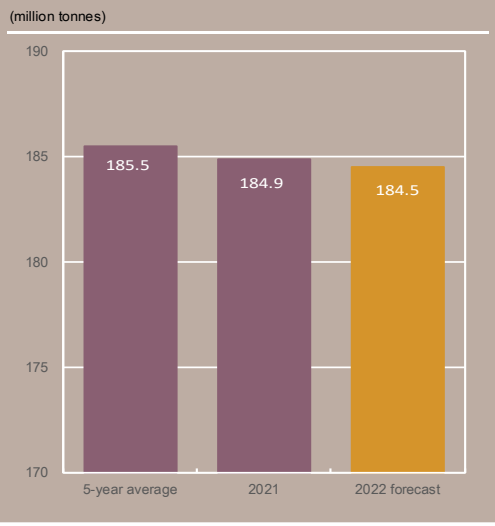
World cereal production 2022 over 2021

(yearly percentage change)

-2.0%

LIFDCs cereal production 2022 over 2021

-0.2%



REGIONAL HIGHLIGHTS

AFRICA Low crop production is expected in several East African countries, most pronouncedly in Somalia, due to the impact of consecutive years of drought. In West Africa, floods and conflicts are contributing to localized production shortfalls, stressing acute food insecurity in Sahelian countries. Planting of the 2023 crops is underway in North Africa, where rainfall deficits persist in parts, and in Southern Africa, where initial seasonal rains have been generally beneficial.

ASIA Cereal production in Far East Asia is forecast at an above-average level in 2022, despite production downturns in several countries, notably Sri Lanka that has been experiencing a macroeconomic crisis. Planting of the 2023 crops is currently ongoing in Far East Asia, with preliminary expectations pointing to an above-average wheat area. In the Near East, dry weather conditions affected crop production in 2022, while in Commonwealth of Independent States (CIS) Asian countries aggregate production is pegged at a near-average level.

LATIN AMERICA AND THE CARIBBEAN In South America, prolonged dry weather conditions in Argentina have dragged down wheat production expectations. However, the total 2022 subregional cereal output is forecast at a well above-average level, reflecting the bumper maize harvests in several countries. The 2023 crops are now being sown and early data points to a record maize area in Brazil. In Central America and the Caribbean, 2022 cereal production is seen to dip below the average, including a low harvest in Haiti, where food insecurity is severely worsening due to widespread violence.

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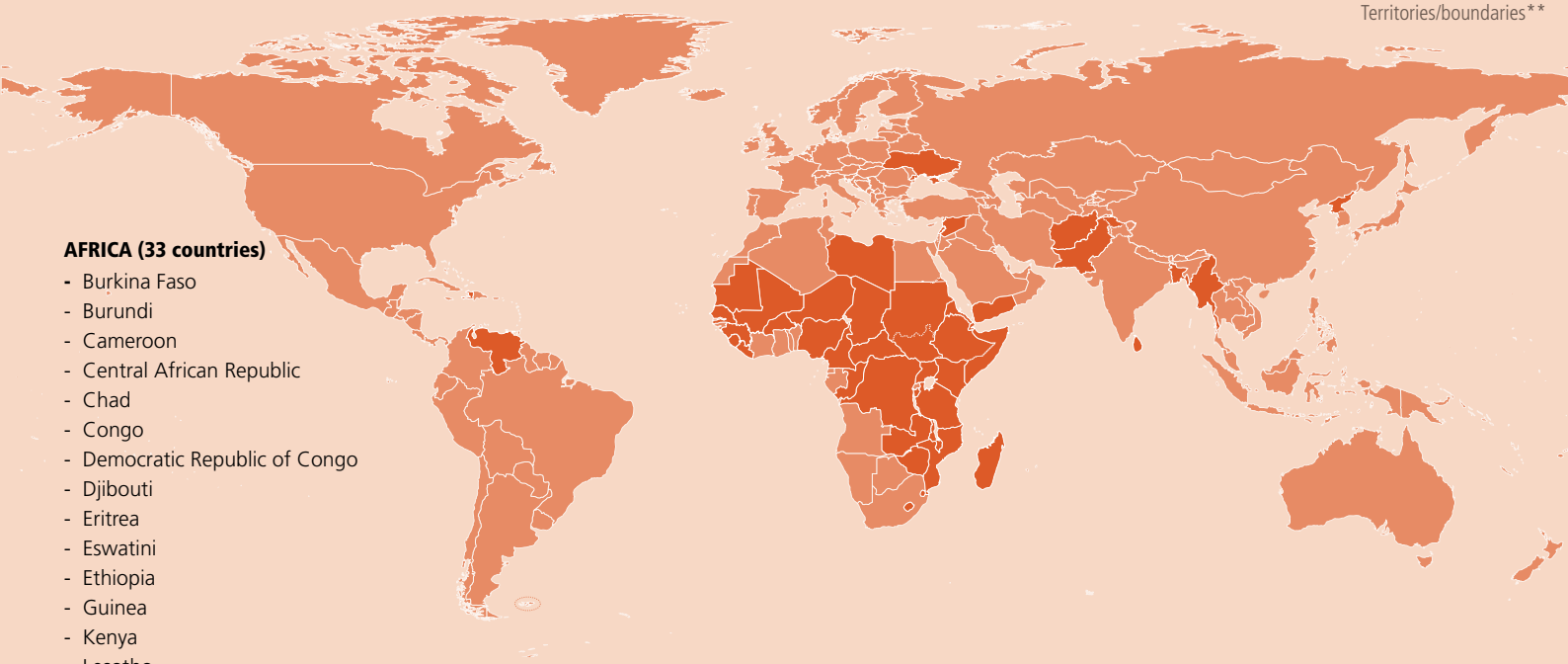
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of November 2022
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)
- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Lebanon
- Myanmar
- Pakistan
- Sri Lanka
- 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: GIEWS, 2022. *Crop Prospects and Food Situation No. 4.* Cited 2 December 2022, 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, population displacement, high food prices, floods

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, issued in November 2022, the number of people in IPC Phase 3 (Crisis) and above is estimated at 2.7 million between September 2022 and March 2023, which includes 2 million people in IPC Phase 3 (Crisis) and 642 000 in IPC Phase 4 (Emergency). This is mainly due to the impact of civil insecurity and high food prices, as well as floods that caused people displacements, damaged standing crops and prevented access to fields.
- In the last quarter of 2022, about 484 000 people were internally displaced and 746 000 refugees were hosted in neighbouring countries, mostly Cameroon, the Democratic Republic of the Congo and Chad.

Kenya

Drought conditions

- About 4.4 million people are estimated to be severely acutely food insecure between October and December 2022 reflecting consecutive poor rainy seasons since late 2020 that affected crop and livestock production, mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

Niger

Conflict, shortfall in cereal production

- According to the latest Cadre Harmonisé (CH) analysis, about 2.04 million people are estimated to be in need of humanitarian food assistance between October and December 2022, reflecting worsening conflicts and higher year-on-year prices of food. The situation is projected to worsen in 2023, as 2.87 million people are projected to face acute food insecurity during the June to August 2023 lean season period.
- As of October 2022, civil conflict has displaced about 375 000 people, mostly in Diffa, Tahoua and Tillabery regions. Furthermore, the country hosts about 295 000 refugees, mainly from Nigeria and Mali.
- Heavy rainfall during the 2022 rainy season triggered severe floods, affecting about 325 000 people across the country and aggravating food insecurity conditions.

Somalia

Drought conditions, civil insecurity

- In August, famine was expected to occur in Baidoa and Burhakaba districts of Bay Region

between October and December 2022, if humanitarian assistance was not urgently scaled up.

- An estimated 6.7 million people were expected to face severe acute food insecurity over the same period, including about 300 000 people facing IPC Phase 5 (Catastrophe), as a result of consecutive poor rainy seasons since late 2020, which severely affected crop and livestock production, and due to heightened conflict since early 2021.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes, high food prices

- About 1.4 million people are estimated to be facing acute food insecurity (IPC Phase 3 [Crisis]) between October and December 2022. The main drivers are erratic February–May rains in some central and southeastern areas that affected pulses production, the lingering socioeconomic impact of the COVID-19 pandemic and high food prices.

Chad

Civil insecurity, shortfall in cereal production

- According to the latest CH analysis, about 810 000 people are facing acute food insecurity (CH Phase 3 [Crisis] and above), between October and December 2022 due to persisting insecurity in Lac and Tibesti regions and flood-related disruptions to livelihoods and food markets. The situation is projected to worsen in 2023, as 1.5 million people are projected to face acute food insecurity during the June to August 2023 lean season period.
- About 380 000 people were displaced due to insecurity in Lake Chad Region as of October 2022. Furthermore, about 575 000 refugees mostly from the Sudan, the Central African Republic, Cameroon and Nigeria reside in the country, due to conflicts and require humanitarian assistance.
- As of early November, unprecedented floods destroyed about 465 000 hectares of crops and affected over 1.1 million people across the country, increasing the risk of a deterioration of food insecurity.

Democratic Republic of the Congo

Civil insecurity in eastern areas, high food prices

- According to the October 2022 IPC analysis, 26.4 million people are estimated to face acute food insecurity (IPC Phase 3 [Crisis] or above) between July and December 2022. This is due to persisting conflict in eastern provinces of North Kivu, South Kivu and Ituri, which continues to cause displacements and drive up staple food prices.
- As of 31 October 2022, 929 000 Congolese refugees were hosted in several neighbouring countries, almost half of which are in Uganda.

Djibouti

Unfavourable weather, high food prices

- About 192 000 people are estimated to be experiencing acute food insecurity (IPC Phase 3 [Crisis] and above) between July and December 2022, mainly due to the impact of insufficient rains in 2021 and 2022, which affected rangelands and pastoral livelihoods, and high food prices.

Eritrea

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

Ethiopia

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

- According to the 2022 Humanitarian Response Plan, 20.4 million people are officially estimated to be facing acute food insecurity.
- In conflict-affected northern Tigray, Amhara and Afar regions, out of the total national figure, 13 million people are facing severe acute food insecurity due to the impact of the conflict on livelihoods.
- Drought conditions that began in late 2020 are affecting millions of people in southern South West, SNNP and Somali regions, and in southern Borena zone of Oromia Region; in Somali Region alone, the worst affected area, 4.1 million people are estimated to be severely food insecure.

Malawi

Localized shortfalls in cereal production, high food prices

- An estimated 3.82 million people are expected to experience acute food insecurity (IPC Phase 3 [Crisis]) between October 2022 and March 2023. This number is more than double the estimate for the January to March 2022 period.
- The worsening situation is driven by high food prices and the effects of weather induced localized shortfalls in cereal production in 2022, particularly in southern districts.

Nigeria

Conflict in northern areas, localized shortfalls in cereal production, high food prices

- According to the latest CH analysis, about 17 million people are in need of humanitarian food assistance between October and December 2022, including about 780 000 in CH Phase 4 (Emergency) and nearly 3 000 in CH Phase 5 (Catastrophe), owing to the deterioration of security conditions and conflicts in northern states, localized shortfalls in staple food production, high food prices and reduced incomes. The situation is projected to worsen in 2023, as 25.3 million people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes about 1.87 million people in CH Phase 4 (Emergency) and nearly 4 000 in CH Phase 5 (Catastrophe).
- As of March 2022 (last data available), about 3.16 million people were estimated to be internally displaced, most of them in northern states.
- As of November 2022, the flood affected about 3.3 million people across the country, compounding conditions in areas already impacted by high levels of food insecurity, malnutrition and violence, mostly in northeastern states.

South Sudan

Economic downturn, floods, civil insecurity

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, owing to rampant inflation and insufficient food supplies, due to a stagnant agricultural production, impact of consecutive years with widespread floods and the escalation of organized violence at subnational level since 2020. About 6.3 million people, more than half of the total population, are expected to be face acute food insecurity between December 2022 and March 2023.
- Particular concern exists for households in Jonglei State and Pibor Administrative Area, where about two-thirds of the population are expected to face severe acute food insecurity, including 33 000 people in IPC Phase 5 (Catastrophe).

Zimbabwe

High food prices

- Based on a government assessment, an estimated 3.8 million people are expected to be in need of humanitarian assistance between January and March 2023. This number is higher than the level estimated in the first quarter of 2022.
- The downturn in food insecurity conditions is largely on account of poor food access, due to prevailing high food prices and reduced incomes owing to the effects of an economic downturn. A decline in cereal production in 2022 has also aggravated conditions.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north, high concentration of displaced people, high food prices

- According to the latest CH analysis, about 2.62 million people are estimated to be acutely food insecure and in need of humanitarian assistance between October and December 2022, of which about 342 000 are in CH Phase 4 (Emergency) and about 1 800 in CH Phase 5 (Catastrophe). The situation is projected to worsen in 2023, as 3.5 million people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes about 564 450 people in CH Phase 4 (Emergency) and nearly 20 000 in CH Phase 5 (Catastrophe).
- In Centre-Nord and Sahel regions, insecurity continued to cause population displacements and, as of October 2022 (latest data available), about 1.76 million people had been displaced and required assistance. In addition, nearly 35 000 refugees, mostly from Mali, are residing in Sahel Region.

Cameroon

Civil insecurity, high food prices

- According to the November 2022 CH analysis, about 3.6 million people are estimated to be acutely food insecure, CH Phase 3 (Crisis) and above, between October and December 2022, as a result of conflict, sociopolitical unrest and high food prices.
- As of 31 October 2022, the number of internally displaced people (IDPs) in the Northwest and Southwest regions was estimated at about 598 000, while IDPs in the Far North Region amounted to almost 378 000.

Congo

Refugee influx

- As of 31 August 2022, an estimated 29 200 refugees from the Central African Republic and 22 200 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.

Eswatini

High food prices, economic downturn

- The latest IPC analysis indicates that nearly 259 000 people are expected face acute food insecurity at least until March 2023, an improvement compared to the previous year.
- Food insecurity in 2022/23 is driven by the high food prices and an expected slowdown in economic growth, curbing households' income earning opportunities.

Guinea

Reduced incomes

- About 650 000 people are estimated to be in need of food assistance between October and December 2022, primarily due to food access constraints on account of the economic effects of the COVID-19 pandemic and high food prices. The situation is projected to worsen in 2023, as about 923 000 people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes about 2 500 people in CH Phase 4 (Emergency).
- As of November 2022, about 48 000 people have been affected by floods.
- In addition, about 2 200 refugees, mostly from Sierra Leone, are residing in the country.

Lesotho

High food prices, economic downturn

- According to the latest IPC analysis, an estimated at 320 000 people are projected to face IPC Phase 3 (Crisis) levels of acute food insecurity between October 2022 and March 2023, a small improvement on the situation in early 2022.
- Food insecurity conditions are primarily underpinned by the high food prices and a slow economic recovery that is impinging on households' economic capacity to access food.

Liberia

High food prices, economic downturn

- According to the latest CH analysis, about 373 000 people are estimated to be in CH Phase 3 (Crisis) and above between October and December 2022, of which nearly 7 500 in CH Phase 4 (Emergency), due to high food prices and a slow economic recovery from the pandemic-induced downturn. The situation is projected to worsen in 2023, as about 530 000 people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes about 21 350 people in CH Phase 4 (Emergency).
- As of October 2022, the country was hosting approximately 1 660 refugees.
- As of November 2022, nearly 90 000 people have been affected by floods.

Libya

Civil insecurity, economic and political instability, high food prices

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

Madagascar

Extreme weather events, slow economic recovery

- Between January and March 2023, an estimated 2.2 million people are projected to face IPC Phase 3 (Crisis) and above levels of acute food insecurity in southern and southeastern areas, due to successive years of droughts and the impact of cyclones in 2022. This number is above the 1.64 million people estimated in early 2022.

Mali

Civil insecurity, high food prices

- According to the latest CH analysis, about 632 000 people were estimated to be in CH Phase 3 (Crisis) and above between June and August 2022, including nearly 15 000 in CH Phase 4 (Emergency), as a result of worsening conflicts, weather shocks and high

food prices. The situation is projected to worsen in 2023, as 1.25 million people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes over 100 000 people in CH Phase 4 (Emergency) and about 1 600 in CH Phase 5 (Catastrophe).

- As of August 2022, about 425 000 people were internally displaced, mostly in central and northern parts of the country. In addition, the country hosts approximately 56 000 refugees, mostly from the Niger, Mauritania and Burkina Faso.
- As of November 2022, nearly 80 000 people have been affected by floods.

Mauritania

Shortfall in agricultural production, economic downturn

- According to the latest CH analysis, about 440 000 people are assessed to be in need of humanitarian assistance between October and December 2022, including about 56 000 in CH Phase 4 (Emergency), as a result of high food prices and reduced incomes. The situation is projected to worsen in 2023, as nearly 695 000 people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes about 106 000 people in CH Phase 4 (Emergency).
- As of September 2022, about 54 000 people have been affected by floods.
- As of October 2022, nearly 100 000 refugees, mostly from Mali, also require humanitarian assistance.

Mozambique

Insecurity in northern areas, extreme weather impacts

- Cyclones and tropical storms in 2022 affected a large number of people, particularly in central provinces, while insecurity in the northern province of Cabo Delgado continues to impact livelihoods and underpins the severest levels of acute food insecurity.
- The latest IPC analysis from December 2021 projected that 1.4 million people were facing acute food insecurity (IPC Phase 3 [Crisis] and above) between April and September 2022.

Namibia

Localized shortfalls in cereal production, economic downturn, high food prices

- High food prices and localized weather induced shortfalls in cereal production in 2022 are expected to result in a comparable number of people facing acute food insecurity (IPC Phase 3 [Crisis] and above) in the January to March 2023 period compared to 2022, when an estimated 750 000 people were in need of assistance.

Senegal

High food prices, floods, reduced incomes

- According to the latest CH analysis, nearly 876 000 people are estimated to be in need of humanitarian assistance between October and December 2022, including nearly 30 000 in CH Phase 4 (Emergency), mostly on abnormally high food prices, the severe effect of floods on livelihoods and food markets, and reduced incomes. The situation is projected to worsen in 2023, as about 1.42 million people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes about 87 000 people in CH Phase 4 (Emergency).
- As of November 2022, about 26 000 people had been affected by floods.
- As of October, an estimated 12 000 refugees, mostly from Mauritania, require humanitarian assistance.

Sierra Leone

High food prices, reduced incomes

- Nearly 790 000 million people are estimated to face acute food insecure between October and December 2022 on account of high food prices and low purchasing power, resulting in acute constraints on households' economic access to food. The situation is projected to worsen in 2023, as about 1.11 million people are projected to face acute food insecurity during the June to August 2023 lean season period. This includes nearly 20 000 people in CH Phase 4 (Emergency).
- As of November 2022, about 17 000 people have been affected by floods.

Sudan

Conflict, civil insecurity, high food prices, tight cereal supplies

- The number of acutely food insecure (IPC Phase 3 [Crisis] and above) people are estimated at 7.7 million between October 2022 and February 2023, mainly due to tight cereal supplies following a below-average 2021 harvest, high food prices and intercommunal conflict.

Uganda

Weather extremes, insecurity, high food prices

- In Karamoja Region, the latest IPC analysis indicates that about 315 000 people, 25 percent of the population, are estimated to be facing acute food insecurity (IPC Phase 3 [Crisis] and above) between August 2022 and February 2023. These conditions reflect the adverse impact of consecutive poor rainy seasons on crop and livestock production, frequent episodes of cattle rustling leading to the loss of productive assets and high food prices.
- About 847 000 refugees from South Sudan and about 467 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

United Republic of Tanzania

Localized shortfalls in staple food production, high food prices

- According to the latest IPC analysis, about 592 000 people were estimated to be in need of humanitarian assistance between May and September 2022, mainly located in northeastern Mara, Arusha, Kilimanjaro and Tanga regions, reflecting crop losses during the "Vuli" 2021 and the "Masika" 2022 seasons. High food prices are also constraining households' economic access to food.

Zambia

Reduced cereal production, high food prices

- An estimated 1.95 million people are expected to experience acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2022 and March 2023, an increase compared to the 1.6 million people estimated in 2021/22.
- The high level of acute food insecurity is associated with the effects of a below-average cereal harvest and high food prices that have adversely impacted households' food availability and access.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict, economic crisis

- The latest available nationwide food security assessment estimated that about 12 million people, 60 percent of the total population, were acutely food insecure in 2021, a slight decline

from the 12.4 million in 2020, but 5 million more than at the end of 2019, mostly due to constrained livelihood opportunities and a rapidly worsening economy.

- Although some international food assistance is being provided, Syrian refugees are pressuring host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, economic downturn, reduction in 2022 agricultural output

- A large portion of the population suffers from low levels of food consumption and poor dietary diversity.
- The food security situation is expected to remain fragile, given persisting economic constraints aggravated by a below-average 2022 agricultural output.

Lebanon

Economic crisis

- In September 2021, the United Nations Economic and Social Commission for Western Asia estimated that, taking into account multiple factors other than income, such as access to health, education and public utilities, 82 percent of the population lives in multidimensional poverty in 2021, up from 42 percent in 2019.
- Over 1.7 million people were estimated to face acute food insecurity at the end of 2021, based on the World Food Programme's (WFP) Consolidated Approach for Reporting Indicators of Food Security rCARI) methodology.

Sri Lanka

Serious macroeconomic challenges, significant reduction in 2022 agricultural output, high food prices

- Severe macroeconomic challenges have had a negative impact on the country's capacity to import cereals, while 2022 cereal production declined sharply, due to a reduced application of agrochemicals.
- Elevated food prices are also constraining economic access to food for a large number of households.
- As a result, food and nutrition security has deteriorated since the beginning of 2022, with a significant proportion of vulnerable households adopting food and livelihood-related coping strategies.

Yemen

Conflict, poverty, floods, high food and fuel prices

- Nearly 17 million people or over 53 percent of the population are classified in IPC Phase 3 (Crisis) or worse 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 18.9 million between June and November 2022.

Bangladesh

Economic constraints, refugee influx, floods, high prices of important food items

- Food insecurity as well as poverty levels have increased, due to income losses caused by the effects of the COVID-19 pandemic.
- About 1 million Rohingya refugees from Myanmar reside in the country, mainly in Cox's Bazar District and on the island of Bhasan Char.
- Floods from May to July affected a large number of people, causing deaths, damages and destruction to agricultural infrastructures as well as losses of livestock and food stocks.
- Domestic prices of wheat flour and palm oil, important food items, were at high levels in October 2022.

Myanmar

Conflict, political instability, economic constraints, high prices of main food staple, reduction in 2022 agricultural output

- The political crisis, following the military takeover on 1 February 2021, caused increased tensions and unrest throughout the country that resulted in population displacement. According to the latest figures (November 2022) from the United Nations High Commissioner for Refugees (UNHCR), the number of IDPs is estimated at about 1.44 million. Most of the IDPs reside in Rakhine, Chin, Kachin, Kayin and Shan states. The current uncertain political situation may further compromise the fragile conditions of vulnerable households and the Rohingya IDPs residing in the country.
- Domestic prices of "Emata" rice, the most consumed variety in the country, were at record levels in October 2022, constraining access to a key staple food.
- Income losses due to the impact of the COVID-19 pandemic have also affected the food security situation of vulnerable households.

Pakistan

Severe floods, reduced agricultural production, economic constraints, high prices of the main food staple

- Severe monsoon floods and landslides caused widespread destruction of crops, livestock assets, agricultural infrastructure, food reserves and disrupted the livelihoods of 33 million people.
- According to the latest IPC analysis, carried out in 28 districts in Balochistan, Sindh and Khyber Pakhtunkhwa provinces, about 6 million people were projected to be facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above), between July and November 2022.
- Prices of wheat flour, the country's main staple, were at elevated levels in most markets in October 2022, constraining access to a key staple food.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela (Bolivarian Republic of)

Economic crisis

- The total number of refugees and migrants from the country is estimated at 7.1 million people, with the largest populations located in Colombia (2.48 million), Peru (1.49 million), Ecuador (502 200), Chile (448 100) and Brazil (365 400). The remaining 0.7 million people are spread across other countries in Latin America and the Caribbean, with about 1 million people located outside the region. Humanitarian needs for refugees and migrants are significant. According to the 2022 Refugee and Migrant Needs Analysis, issued in October 2022, the number of Venezuelan refugees and migrants in need of food assistance is estimated at 3.16 million in 2022.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Reduced agricultural production, sociopolitical turmoil, natural disasters

- About 4.56 million people were estimated to be facing severe acute food insecurity and in need of urgent food assistance between March and June 2022. The high levels of food insecurity are the result of consecutive reduced cereal harvests between 2018 and 2021, and elevated food prices, exacerbated by sociopolitical turmoil and worsening insecurity. The lack of income-earning opportunities amid worsening insecurity and difficult macroeconomic conditions is likely to heighten food insecurity.

NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

WIDESPREAD LACK OF ACCESS

Ukraine

Conflict

- According to the August update of the Ukraine Flash Appeal 2022, 17.7 million people are estimated to be in urgent need of humanitarian assistance and protection due to the war, including about 6.5 million people who are internally displaced.

Terminology

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

- Countries facing an **exceptional shortfall in aggregate food production/supplies** as a result of crop failure, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, or other supply bottlenecks.

- Countries with **widespread lack of access**, where a majority of the population is considered to be unable to procure food from local markets, due to very low incomes, exceptionally high food prices, or the inability to circulate within the country.

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

*** Unfavourable Production Prospects**
Countries facing unfavourable crop production prospects are countries where current conditions indicate a high likelihood that cereal production would fall below the five-year average, as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests and diseases, conflicts and other negative factors. This list does not include countries where production declines are mainly driven by deliberate/predetermined economic and/or policy decisions (see Regional Reviews):
page 12 (Africa)
page 21 (Asia)

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

FAO's forecast for world cereal **production** in 2022 has been cut by 7.2 million tonnes in December and is now pegged at 2 756 tonnes, 2 percent (57 million tonnes) lower year-on-year. By comparison, world cereal production grew by an average of 56 million tonnes per year in the last three years. This recent month-on-month downgrade mainly concerns maize and, albeit by a smaller amount, wheat production.[1]

Global coarse grain production in 2022 is pegged at 1 462 million tonnes following an almost 5-million-tonne cut made in December and is now seen to decline by 3.1 percent compared to the 2021 outturn. The recent reduction principally reflects lower maize harvest prospects in Ukraine, where the impact of the war has made post-harvesting operations prohibitively expensive, compelling many farmers to leave planted areas unharvested. Latest official data also confirm a smaller-than-previously-predicted crop in Serbia, where drought has sharply curtailed yields. Conversely, small upward revisions are made to production estimates in Türkiye and Paraguay. Global wheat production in 2022 has been lowered by 2.7 million tonnes this month to 781.2 million tonnes, nevertheless, it remains a record high. The month-on-month cutback almost entirely concerns Argentina, where prolonged dry weather conditions are impairing yields, which have dragged down production prospects. Partly offsetting this decline, production estimates are raised for the United Kingdom of Great Britain and Northern Ireland and Kazakhstan, resting on higher-than-expected yields. Global rice production in 2022 remains forecast to fall 2.4 percent below the 2021 all-time record to an overall volume of 512.8 million tonnes (milled basis). This level is slightly higher than expectations in November, largely due to a better-than-earlier anticipated outcome in Madagascar and historical output revisions, namely for the Democratic Republic of the Congo, Malaysia and the Bolivarian Republic of Venezuela.

Planting of the 2023 winter wheat crop is ongoing in the Northern Hemisphere countries. Concerns over the affordability of inputs have raised uncertainty over global planting expectations, although the elevated crop prices could help to maintain an above-average area. In the United States of America, winter wheat plantings proceeded at a quick pace and were almost complete as of mid-November. Drought is currently affecting about three-quarters of the winter wheat area and the drier conditions are forecast to persist in the southern Great Plains until early next year, although some improvements are expected elsewhere. In the European Union, winter wheat sowings are ongoing under broadly conducive weather conditions, supporting crop emergence. However, increased precipitation is needed in some areas that experienced rainfall deficits earlier in the year, including parts of northern Italy. In Ukraine, a 40-percent decrease in wheat plantings from the five-year average is forecast, as the war continues to constrain access to fields and cause severe input shortages. In the Russian Federation, abundant rains that hindered land preparation and relatively lower domestic prices are expected to cause an area contraction, with winter wheat plantings

Table 1. World cereal production
(million tonnes)

	2020	2021 estimate	2022 forecast	Change: 2022 over 2021 (%)
Asia	1 231.8	1 241.1	1 237.9	-0.3
Far East	1 117.1	1 149.3	1 135.3	-1.2
Near East	79.5	61.1	68.8	+12.6
CIS in Asia	35.2	30.7	33.8	+10.2
Africa	199.9	201.8	193.6	-4.1
North Africa	31.4	36.7	31.3	-14.7
West Africa	66.9	63.8	65.7	+3.0
Central Africa	6.9	7.0	7.0	-0.5
East Africa	57.7	53.2	52.8	-0.7
Southern Africa	37.0	41.2	36.8	-10.6
Central America and the Caribbean	42.6	42.9	41.2	-3.9
South America	232.7	227.6	244.7	+7.5
North America	495.4	495.8	479.7	-3.3
Europe	524.6	548.8	508.7	-7.3
European Union[1]	284.7	296.4	273.9	-7.6
CIS in Europe	204.1	214.8	197.4	-8.1
Oceania	50.5	55.4	50.7	-8.6
World	2 777.4	2 813.3	2 756.4	-2.0
- wheat	775.2	778.2	781.1	+0.4
- coarse grains	1 483.7	1 509.5	1 462.4	-3.1
- rice (milled)	518.5	525.6	512.8	-2.4

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

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

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

forecast to decline from last year to a near-average level. In Asia, high domestic prices are seen supporting above-average wheat plantings in China (mainland) as well as in India, where the government raised the minimum support price of wheat. The effects of extensive flooding in Pakistan between June and August could result in a decrease in the wheat area, with plantings normally completed by December.

The 2023 coarse grain crops are being sown in the Southern Hemisphere countries. In Brazil, official forecasts point to a record-high maize area, underpinned by remunerative domestic prices and generally beneficial weather at the start of the season. In South Africa, provisional planting intentions point to a likely moderate decline in the maize acreage from last year, but to remain at an above-average level. Weather conditions in South Africa and neighbouring countries have so far been favourable, supporting early crop development.

World cereal **utilization** in 2022/23 is forecast at 2 777 million tonnes, nearly unchanged from expectations in November and pointing to a 0.7 percent (21 million tonnes) decline from 2021/22. The forecast for total utilization of coarse grains in 2022/23 has been lowered marginally (1.2 million tonnes) from the previous forecast in November to 1 484 million tonnes, marking a likely 1.3-percent fall from the previous season. The foreseen decline is driven mostly by an expected contraction in feed use especially of maize, but also of barley and sorghum, as well as in the industrial use of maize. The forecast for global wheat utilization in 2022/23 is unchanged from last month at 775 million tonnes, suggesting a fractional increase (0.2 percent) from the 2021/22 level, with a rise in the use of wheat for food predicted to counter an expected fall in feed use and, to a much lesser extent, in other uses. World rice utilization in 2022/23 is now forecast at 519 million tonnes, some 600 000 tonnes more than in November but still down 0.6 percent from the 2021/22 historical peak.

The forecast for world cereal **stocks** by the close of seasons in 2023 has been scaled down by 1.1 million tonnes, compared to the forecast in November to 839 million tonnes, representing a 2.2-percent (18.5 million tonnes) decline from the previous season and the lowest level in three years. At this level, the global cereal stock-to-use ratio would drop from 30.9 percent in 2021/22 to 29.3 percent in 2022/23, marking the lowest level since 2013/14, but still representing a relatively comfortable supply situation. Total coarse grain inventories are seen lower than earlier anticipated by 2.1 million tonnes, primarily stemming from downward revisions made for maize inventories in Ukraine on account of a lower production estimate. This month's revision brings the forecast for total coarse grain inventories down to 345 million tonnes, representing a 6.1 percent fall below opening levels, largely attributed to a 6.8-percent forecast fall in the global stocks of maize. The forecast for world wheat inventories remains near the previous month's forecast of 300 million tonnes, representing a 2.4-percent rise above opening levels. The bulk of the increase is anticipated to be concentrated in China (mainland) and the Russian Federation, outweighing anticipated drawdowns in several other countries, in particular India, the European Union, Ukraine and the United States of America. Following a 500 000-tonne aggregate upward revision to forecasts of reserves held by rice importers, FAO now anticipates world rice stocks at the close of the 2022/23 marketing years at 194 million tonnes, down 1.6 percent from the 2021/22 peak, but still the second highest level on record.

World **trade** in cereals in 2022/23 is forecast at 472 million tonnes, up 2.7 million tonnes from expectations in November, but still pointing to a likely 1.9-percent (9.2 million tonnes) contraction from the 2021/22 record level. Despite a 2.3-million-tonne upward revision made in December, world trade in coarse grains in 2022/23 (July/June) is still forecast to decline by 2.6 percent from the 2021/22 level, down to 225 million tonnes. This month's increase is the result of a 2.1-million-tonne upward adjustment to global maize trade, primarily reflecting a continued strong export pace from Brazil and higher import demand anticipated for the European Union to compensate for reduced domestic production. Forecast at 194 million tonnes, world trade in wheat in 2022/23 (July/June) is predicted to fall by 0.8 percent from the 2021/22 level. While the latest global forecast is close to the figure of November, revisions were made to the export forecasts of some countries in December. Expected shipments from Australia and the Russian Federation were revised upwards mostly on account of good supplies and high import demand, while downward adjustments were made for exports from Argentina, following a reduction to the domestic production estimate, and the European Union, based on higher competition. FAO's forecast for international trade in rice in 2023 (January–December) remains pegged at 52.9 million tonnes, down from a revised level of 54.5 million tonnes for 2022, with the forecast 2.9 percent annual reduction largely reflecting predicted reduced shipments by India, as well as by Brazil, Pakistan, Uruguay and the United States of America.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2020/21	2021/22 estimate	2022/23 forecast	Change: 2022/23 over 2021/22 (%)
Production[I]	2 777.4	2 813.3	2 756.4	-2.0
Trade[II]	480.0	480.7	471.6	-1.9
Utilization	2 758.4	2 798.0	2 777.4	-0.7
Per caput cereal food use (kg per year)	148.5	148.5	148.9	+0.3
Stocks[III]	837.9	857.9	839.4	-2.2
World stock-to-use ratio (%)	29.9	30.9	29.4	-4.8

Note: Totals and percentage change computed from unrounded data.

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

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

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

Near-average cereal outturn in 2022

Harvesting of the 2022 cereal crops in the Low-Income Food-Deficit Countries (LIFDCs)[2] is nearing completion and planting of the 2023 crops is already underway. In total, aggregate LIFDC cereal production in 2022 is pegged at 184.5 million tonnes, virtually on par with the previous five-year average.

In *Africa*, the LIFDCs are forecast to produce about 111.5 million tonnes of cereals in 2022, a slight downturn compared to the five-year average. The production decline mostly reflects the impact of multiseason drought conditions in *East Africa*, which caused production decreases in the leading producers, namely **Ethiopia**, **Kenya** and **Uganda**. A particularly steep decline is estimated in **Somalia**, where the cereal harvest is pegged at a level 34 percent below the five-year average. In *West Africa*, aggregate production in 2022 is close to the average, reflecting generally good harvest expectations in the coastal countries that are offsetting reduced prospects in the Sahelian countries due to severe flooding and insecurity. Total cereal production in *Southern Africa* is estimated at an average level, but down compared to the previous year owing to a poor rainfall distribution. Production of cereals in *Central Africa* is forecast to remain virtually unchanged on a yearly basis in 2022 and similar to the five-year average, as persisting conflicts continued to curtail production.

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

	5-year average	2021/22 estimate	2022/23 forecast	Change: 2022/23 over 2021/22 (%)
Cereal production[I]	*185.5*	*184.9*	*184.5*	*-0.2*
Utilization	*239.2*	*248.1*	*250.7*	*+1.0*
Food use	*178.2*	*185.5*	*191.1*	*+3.0*
Per caput cereal food use (kg per year)	*151.8*	*150.8*	*151.8*	*+0.7*
Feed	*26.3*	*27.5*	*26.9*	*-2.2*
End of season stocks[II]	*55.2*	*56.9*	*50.8*	*-10.7*

[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	2021 estimate	2022 forecast	Change: 2022 over 2021 (%)
Africa (36 countries)	*112.1*	*111.7*	*111.5*	*-0.2*
East Africa	*55.0*	*53.2*	*52.8*	*-0.7*
Southern Africa	*11.4*	*14.0*	*11.8*	*-15.8*
West Africa	*38.7*	*37.6*	*40.1*	*+6.4*
Central Africa	*7.0*	*6.9*	*6.9*	*-0.5*
Asia (9 countries)	*72.3*	*72.1*	*72.0*	*-0.2*
CIS in Asia	*9.8*	*9.7*	*10.1*	*+4.7*
Far East	*54.0*	*56.1*	*55.5*	*-0.9*
Near East	*8.5*	*6.4*	*6.4*	*-1.0*
Central America and the Caribbean (2 countries)	*1.1*	*1.0*	*1.0*	*-4.4*
LIFDCs (47 countries)	*185.5*	*184.9*	*184.5*	*-0.2*

Notes: Includes rice in milled terms. Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

[2] The inclusion of a country in the low-income food-deficit countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self-exclusion (when countries that meet the first two criteria request to be excluded from the category). For full details see: www.fao.org/countryprofiles/lifdc

In *Asia*, the aggregate cereal output of the LIFDCs is pegged at an average level of 72 million tonnes. Reduced cereal harvests are estimated in the *Near East* countries of **Afghanistan** and **the Syrian Arab Republic**, owing to adverse weather conditions and persisting difficult economic conditions that have constrained farmers' ability to access sufficient agricultural inputs. An above-average cereal harvest is expected in the *Far East*, driven by a large output in **Bangladesh**. Near-average cereal outturns are forecast in *CIS Asian* countries, on account of broadly conducive weather conditions.

In *Central America and the Caribbean*, cereal production in **Haiti** is forecast at a below-average level in 2022, owing to reduced plantings and poor yield prospects, as farmers struggled to access agricultural inputs, amid reduced availabilities and elevated prices.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

	2020/21 or 2021 Actual imports	2021/22 or 2022 Import estimate	2022/23 or 2023 Import requirement[1]
Africa (36 countries)	*31 880*	*33 051*	*32 186*
East Africa	*12 402*	*14 190*	*13 450*
Southern Africa	*3 702*	*3 047*	*3 245*
West Africa	*13 112*	*13 134*	*12 854*
Central Africa	*2 664*	*2 680*	*2 637*
Asia (9 countries)	*28 833*	*28 859*	*29 951*
CIS in Asia	*5 718*	*5 393*	*5 312*
Far East	*12 652*	*12 270*	*13 681*
Near East	*10 464*	*11 196*	*10 959*
Central America and the Caribbean (2 countries)	*1 466*	*1 542*	*1 569*
LIFDCs (47 countries)	*62 179*	*63 452*	*63 707*

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).

Import requirements increase, amid high global prices

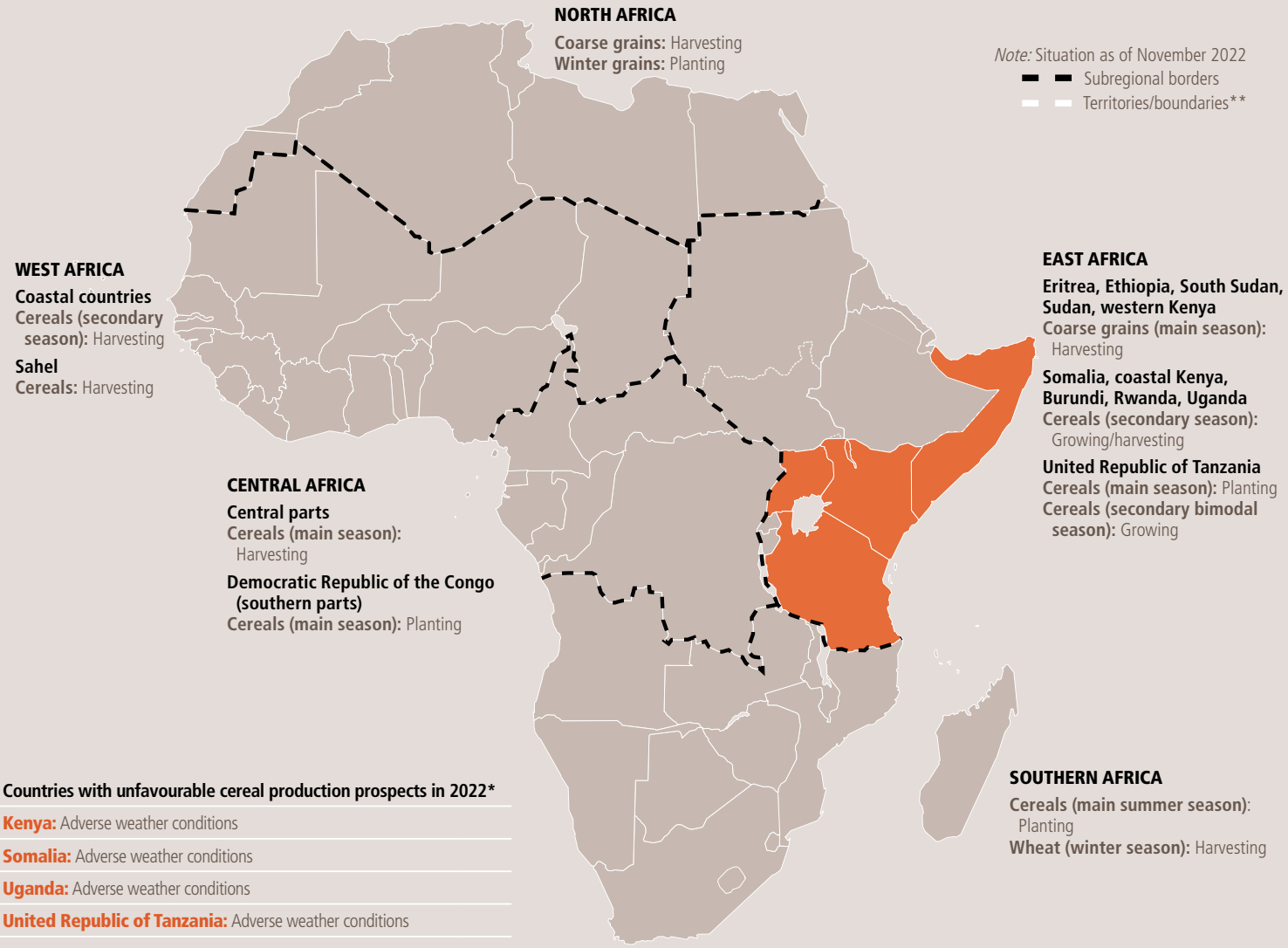
The total cereal import requirement for LIFDCs is forecast at 63.7 million tonnes in the 2022/23 marketing year, 7 percent above the previous five-year average, mainly due to larger volumes in *East African* and *Far East Asian* countries.

In *East Africa*, domestic supply conditions are foreseen to be particularly tight, on account of the below-average production in 2021 and a likely poor harvest in 2022. As a result, import requirements have increased in 2022/23. In *Southern Africa*, despite the lower 2022 harvest, import needs are just moderately above the five-year average as two years of bumper cereal outturns have reinforced national stocks and contributed to limiting import requirements. In *West Africa*, import needs are also forecast to slightly exceed the five-year average, with most increases concentrated in the Sahelian countries.

In *Asian* countries, aggregate import needs in 2022/23 are forecast at 7 percent above the previous five-year average. Import requirements are seen to rise steeply in **Afghanistan** and **Nepal** on account of the reduced harvests in 2022. Elsewhere in the region, import requirements are at near-average levels.

International benchmark cereal prices strengthened between August and October 2022, and remained at higher year-on-year levels. Reflecting this situation and considering compounding domestic factors, most prominently currency depreciations, the import bills of the LIFDCs are foreseen to increase in 2022/23. Retail prices of key cereal staple foods in several LIFDCs were already at significantly higher year-on-year levels as of September and October 2022. The high prices are a serious concern to acute food insecurity, particularly in consideration of the large share of income that poor households use to purchase food.

REGIONAL REVIEWS
AFRICA



Countries with unfavourable cereal production prospects in 2022*

- **Kenya:** Adverse weather conditions
- **Somalia:** Adverse weather conditions
- **Uganda:** Adverse weather conditions
- **United Republic of Tanzania:** Adverse weather conditions

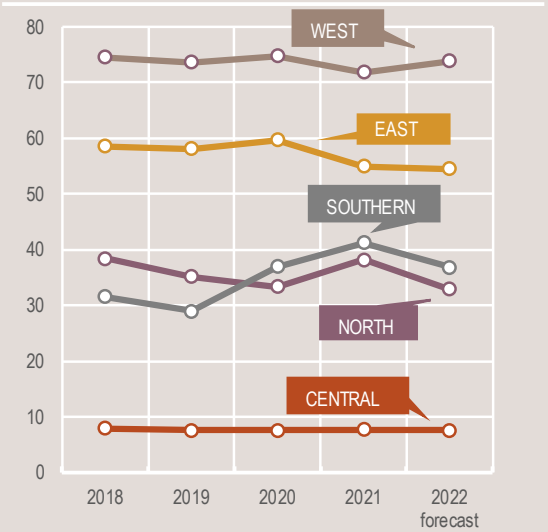
*/** See Terminology (*page 7*).
Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

Source: GIEWS, 2022. *Crop Prospects and Food Situation No. 4.* Cited 2 December 2022, modified to comply with the United Nations map No. 4045 Rev. 8, 2018.

Production Overview

The bulk of the 2022 cereal crop has been harvested and the aggregate regional output is forecast at 207.4 million tonnes, 3.4 million tonnes less than the previous five-year average, principally owing to adverse weather conditions. Drought in North Africa dragged down wheat production, especially in Morocco, and poor rains curtailed yields in Southern Africa, although the subregional output remained near average. Multiseason droughts in East Africa have also curbed production and the total cereal outturn is forecast to fall by nearly 4 percent compared to the average. In West Africa, cereal production is pegged at an above-average level in 2022 owing to abundant rains which, however, also caused extensive flooding, while conflicts continued to disrupt agricultural activities in Sahelian countries, with negative impacts on production. In Central Africa, agricultural production in 2022 continues to be constrained by conflicts, population displacements and high inputs prices. Planting of the 2023 crops began in North Africa, where rainfall deficits persisted, and Southern Africa, which received good initial seasonal rains.

Cereal production
(million tonnes)



NORTH AFRICA

More rain needed for sowing of the 2023 winter crops in the west

Sowing of the 2023 winter wheat and coarse grains crops usually starts in late October and continues until the end of the year. As of mid-November, significant rainfall deficits combined with above-average temperatures were reported in western growing areas. In **Morocco** and western **Algeria**, in the three months to November, the cumulative rainfall amount was 20 percent below average, with temperatures up to 5 degrees above average, increasing evapotranspiration and affecting the already scarce soil moisture. In eastern **Algeria** and **Tunisia**, showers in the first decade of November partially decreased the moisture deficits in the main producing areas around the coast, but sustained rainfall is still needed to ensure adequate crop establishment. In **Egypt** and **Libya**, rainfall amounts have been satisfactory, allowing a timely start of sowing operations in November.

Improved weather conditions during the rest of the season could still support a substantial outturn of 2023 cereal crops. Even before the surge in fertilizer prices starting in 2021, many governments in the subregion subsidized some agricultural inputs to support domestic production. More recently, several governments have introduced price ceilings to improve access to inputs. Nevertheless, problems of access, or shortages in case of price ceilings, could lead to reduced application rates of fertilizers, potentially curtailing crop yields.

Below-average cereal production in 2022

The subregion's aggregate cereal production in 2022 is estimated at 33 million tonnes, about 10 percent below the previous five-year average and 14 percent down from the previous year's level. The aggregate wheat harvest is pegged at 16.6 million tonnes, 12 percent lower year-on-year and 19 percent below the average. The largest production decrease was recorded in **Morocco**, where the cereal output is estimated at almost 3.3 million tonnes, almost 60 percent below the average, reflecting widespread drought. By contrast, in **Algeria**, despite some dry spells, 2022 cereal output partially recovered from the drought-affected 2021 harvest, remaining 10 percent below the average. Elsewhere in the subregion, 2022 cereal harvests were close to, or slightly, above the previous five-year average.

All countries in the subregion rely heavily on wheat imports to cover their domestic consumption needs. Reflecting a below-average 2022 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, is forecast at 51 million tonnes in the 2022/23 marketing year (July/June), 2 percent above the five-year average. Despite the elevated international prices and the uncertainty on the global commodity markets, part of the wheat and rice imports are going to be used to boost stocks with the aim to improve domestic preparedness in case of additional future market shocks.

Food inflation rates at elevated levels

With the exception of **Libya**, year-on-year food inflation rates continued to linger at substantially high levels or they have increased steadily in the third quarter of 2022, reflecting elevated international commodity prices as well as balance of payments challenges that have contributed to weakening the national currencies. However, the presence of consumer subsidies for many basic food commodities have prevented the complete transmission of the elevated international food prices to domestic markets.

In **Morocco**, the annual food inflation rate increased from single-digit values in early 2022 to 15 percent in September 2022, a multi-year high. In **Egypt**, where the food price inflation is more volatile due to a large share of unsubsidized products in the consumer price index, such as vegetables, the rate increased from single digits in the last quarter of 2021 to 26 percent in April 2022, before easing slightly to 22 percent in September 2022. The October 2022 rate increased moderately to 24 percent. In **Tunisia**, in September and October 2022, the annual food inflation rate was estimated at about 13 percent, the highest level since the beginning of the food price inflation series in 2007. Similarly, food prices increased 17 percent year-on-year in June 2022 in **Algeria**, the highest level since the beginning of the series in 2010, before easing to 14.5 percent in July and August 2022.

In **Libya**, the annual food inflation rate between September 2021 and September 2022 (incomplete series with missing data points) fluctuated between 4 and 6 percent, the lowest levels in the subregion. According to the 2022 Libya Humanitarian Needs Overview, about 0.8 million people (10 percent of the population) are estimated to be in need of humanitarian assistance in 2022, down from 1.3 million one year earlier. This figure includes 500 000 people requiring food assistance, about one-third less than in 2021.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
North Africa	18.9	20.4	16.6	12.4	12.9	11.0	5.7	4.9	5.4	37.0	38.2	33.0	-13.8
Algeria	3.2	2.5	3.0	1.4	1.0	1.1	0.0	0.0	0.0	4.6	3.5	4.1	+17.1
Egypt	8.8	9.0	9.7	8.2	8.5	8.5	5.6	4.9	5.3	22.6	22.3	23.5	+5.3
Morocco	5.7	7.5	2.5	2.1	2.9	0.8	0.1	0.1	0.1	7.9	10.5	3.3	-68.4
Tunisia	1.2	1.2	1.3	0.6	0.5	0.6	0.0	0.0	0.0	1.7	1.7	1.8	+9.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

WEST AFRICA

Above-average 2022 production despite impacy of flooding and conflicts

In coastal countries along the Gulf of Guinea, harvesting of the second season crops in southern bimodal areas is underway and is expected to conclude in January 2023, while harvesting of the main season crops recently concluded. In **Guinea**, **Sierra Leone**, **Liberia** and **Guinea-Bissau**, 2022 rice and coarse grains harvests are expected at levels close to or above the five-year average, reflecting overall favourable weather conditions that supported good yields and large plantings. The provision of subsidized seeds and fertilizers by national governments also contributed to the higher production levels, while the high market prices further supported the increase in plantings. In **Benin**, **Côte d'Ivoire**, **Ghana** and **Togo**, similar factors are expected to result in average to above-average cereal outputs at the national level. However, an increase in conflict-related incidents in northern areas of these countries bordering Mali, Burkina Faso and the Niger, owing to a spread of the central Sahel security crisis, caused disruptions to agricultural activities, likely leading to localized shortfalls in production. In **Nigeria**, cereal production is forecast at a near-average level, in part due to overall conducive weather conditions and an expansion of the planted area to cereal crops, driven by large paddy areas, which more than offset crop losses associated poor security conditions in the north and floods triggered by abundant rainfall amounts between July and October.

In the Sahel, harvesting of the 2022 main season coarse grains and rice crops is nearly complete. Above-average and higher year-on-year cereal outputs are expected in all Sahelian countries mainly due to conducive weather conditions that boosted yields. In **the Niger**, cereal production is expected to increase by 65 percent compared to the weather-reduced and well below-average outturn in 2021, reflecting beneficial effects of abundant rains and the distribution of fertilizers and pesticides by the government. Above-average and higher year-on-year cereal outputs are also forecast in **Cabo Verde**, **the Gambia** and **Mauritania**, owing to overall favourable weather conditions, and in **Senegal**, due to increased plantings and high yields underpinned by a series of government measures, including raising the guaranteed paddy farm gate price, and increasing the provision of subsidized credit and agricultural inputs. In **Burkina Faso**, **Chad** and **Mali** cereal production is forecast to increase year-on-year and reach an above-average level, similarly on account of conducive rains. However, localized production shortfalls are expected due to poor security conditions in Liptako-Gourma and Lake Chad Basin areas and in Chad, which was also impacted by floods.

Overall, aggregate cereal production in 2022 is forecast at 76.4 million tonnes, 7 percent above the estimated output in 2021 and 6 percent above the previous five-year average, based on recent estimates from the Permanent Interstate Committee for Drought Control in the Sahel (CILSS).

At subregional level, imports of rice in 2022 are estimated at 10.9 million tonnes, 4 percent above the previous year and about 13 percent higher than the previous five-year average, reflecting strong import demand, particularly in Sahelian countries. Imports of wheat grain and flour in 2021/22 are estimated at 8 million tonnes, 25 percent below the previous year and about 20 percent lower than the previous five-year average, owing to elevated international prices, the interruption of shipments from ports in the Black Sea Region and currency depreciations in several countries.

Prices of cereals at high levels in most costal and Sahelian countries

In coastal countries of the Gulf of Guinea, prices of coarse grains were well above their year-earlier levels. In **Nigeria**, prices of maize and millet increased between September and October and were on average over 15 percent higher year-on-year. In northeastern and northcentral markets, the year-on-year price increases were steeper due to poor security conditions and increased transportation costs, compounded by the recent flood-related disruptions. Prices of rice also increased during the same period, underpinned by strong demand and currency weakness. In **Ghana**, despite above-average market supplies, prices of coarse grains increased in September and October, and were more than double their year-earlier levels. The high prices reflect persistent inflationary pressures from strong export demand, a depreciation of the national currency and high international commodity prices. In **Togo**, prices of maize and sorghum declined in September and October in most markets but increased in the capital Lomé and in northern areas bordering Burkina Faso, owing to strong export demand. On a yearly basis, prices of maize and sorghum were up to 25 and 40 percent above their respective year-earlier levels, supported by high production costs. In **Benin**, prices of maize and sorghum were below their year-earlier levels as of October.

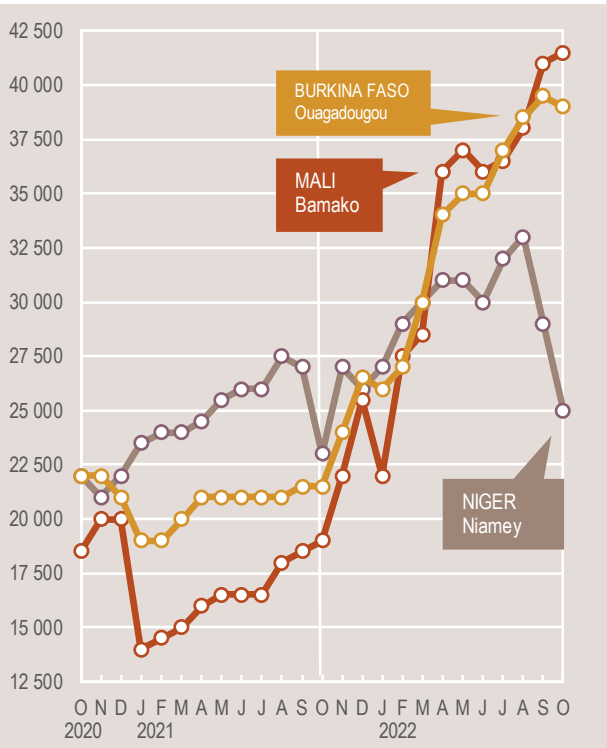
In Sahelian countries, prices of coarse grains were at exceptionally high levels, supported by strong demand, below-average market supplies, conflict-related disruptions and high global prices. In **Mali**, prices increased steadily in 2022 and were more than double their year-earlier levels in October, with sharp increases registered in markets located in central areas affected by conflicts and in areas bordering Senegal and Burkina Faso. In **Burkina Faso**, prices of coarse grains levelled off seasonally between August and October, following strong gains during the first half of 2022. On a yearly basis, prices had more than doubled, as the high concentration of internally displaced persons in northern and eastern areas increased local demand for food. In **the Niger**, prices of coarse grains declined seasonally in September and October and were mostly near their year-earlier values, reflecting the sharp production upturn in 2022. However, in Niamey and in conflict-affected Tillaberi, prices were still up to 15 percent above their year-earlier levels, mostly supported by conflict-related disruptions to markets. In **Chad**, prices of coarse grains followed mixed trends in August and September and remained well above their year-earlier levels, reflecting major disruptions to markets and livelihoods following unprecedented floods and poor security conditions in Lac and Tibesti regions. In **Senegal** and **Cabo Verde**, prices of maize and rice strengthened steadily in 2022 and, between September and October, they were up to 85 and 55 percent higher on a yearly basis,

respectively. The elevated prices reflect high production costs, amid high prices of fertilizers and energy, and the depreciation of the national currency.

Alarming levels of acute food insecurity in the 2022 post-harvest period

The prevalence of acute food insecurity in the subregion remains at alarming levels during the 2022 post-harvest period. According to the latest "Cadre Harmonisé (CH)" analysis, nearly 29 million people are estimated to be facing acute food insecurity, CH Phase 3 (Crisis) and above, between October and December 2022, well above the 23.67 million estimated at the end of 2021. This figure includes about 1.42 million people in CH Phase 4 (Emergency) and 4 792 people in CH Phase 5 (Catastrophe), of which 2 975 people are in **Nigeria** and 1 817 people in **Burkina Faso**. The highest prevalence of acute food insecurity is reported in **Nigeria**, where about 17 million people need urgent food assistance, followed by **Burkina Faso** (2.62 million), **the Niger** (2.04 million), **Senegal** (876 000), **Côte d'Ivoire** (850 000), **Ghana** (823 180), **Chad** (810 000) and **Sierra Leone** (788 000).

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



Despite the ongoing cereal harvest and the favourable production prospects, the number of people requiring food assistance is estimated at an alarmingly high level in the last quarter of 2022, mainly due to worsening security conditions and protracted conflicts, floods and abnormally high food prices. Worsening security conditions in the Lake Chad Basin and the Liptako-Gourma Region as well as the increase in violent incidents in northern parts of coastal countries have disrupted agricultural livelihoods, labour migration flows and the delivery of humanitarian food assistance, constraining availability of and access to food. According to United Nations High Commissioner for Refugees (UNHCR), as of October 2022, about 6.11 million people were internally displaced in Burkina Faso, Chad, Mali, the Niger and Nigeria, over 10 percent more than the previous year, while 1.22 million people sought shelter as refugees and asylum seekers across the subregion. In addition, according to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), as of November 2022, widespread floods affected about 5.22 million across coastal and Sahelian countries, particularly in **Nigeria** and **Chad**, further constraining food access and availability.

Levels of acute food insecurity are expected to increase in 2023. Food availability and access are likely to remain limited by conflict-related market disruptions and high food prices, exacerbated by the ripple effects of the war in Ukraine on international trade and commodity prices. Severe macroeconomic challenges, particularly in **Nigeria**, **Sierra Leone**, **Liberia** and **Ghana**, are likely to compound food insecurity conditions for most vulnerable households. At the peak of the next lean season, between June and August 2023, a record high 42 million people are projected to face severe conditions of acute food insecurity.

CENTRAL AFRICA

Conflicts, displacements and high input prices constrained 2022 agricultural production

In the unimodal rainfall northern areas of **Cameroon** and **the Central African Republic**, harvesting of the 2022 millet and sorghum crops was completed in November. In central and southern areas, the 2022 secondary season maize crops have been planted in October under overall favourable weather conditions and will be harvested in January 2023.

In the northern provinces of **the Democratic Republic of the Congo**, harvesting of the 2022 main maize crop finalized in November, while it is still ongoing in the central provinces and will finalize next January. In **the Republic of the Congo** and **Gabon**, harvesting of the 2022 main maize crops, planted in September, will start in mid-December.

Weather conditions have been generally conducive across the subregion during the season. Above-average precipitation amounts since July benefitted crop development, but also caused flooding in some parts of the subregion with localized damage to standing crops. According to latest weather forecasts, favourable weather conditions are likely to persist until the end of the harvest period in early 2023.

The 2022 crop production is forecast at low levels as agricultural activities have been hampered by the ongoing insecurity and population displacements in **the Central African Republic**, in eastern areas of **the Democratic Republic of the Congo** and in Far North, Northwest and Southwest regions of **Cameroon**. In addition, elevated international prices of fertilizers and improved seeds, largely imported, constrain farmers' access to agricultural inputs, resulting in low application rates with negative effects on yields and/or reduced areas under cultivation.

Prices of imported food at high levels

In **Cameroon**, **the Central African Republic** and **the Democratic Republic of the Congo**, prices of imported food commodities, such as rice, wheat flour and vegetable oil, were at high levels in the fourth quarter of 2022 compared to previous years. This reflects high international prices and elevated transportation costs. For instance, as of September 2022, prices of imported rice in **the Central African Republic** and wheat flour in **Cameroon** were both on average about 40 percent higher year-on-year.

According to the International Monetary Fund (IMF), the average annual inflation rates in 2022 are expected to increase year-on-year by 2 to 5 percentage points in **Cameroon**, **the Central African Republic, the Republic of the Congo, Equatorial Guinea** and **Gabon**, but to remain below 7 percent. By contrast, the inflation rate is forecast to decline slightly in **the Democratic Republic of the Congo,** but stay at a high level of about 8 percent.

Almost 33 million people severely food insecure

The number of severely acute food insecure people in **the Democratic Republic of the Congo**, **Cameroon** and **the Central African Republic** is estimated at 32.7 million in the last quarter of 2022, about 25 percent of the three countries' population. The main factors underpinning this number are the ongoing conflicts, which continue to cause population displacements and widespread disruption of agricultural and marketing activities, and elevated food and energy prices, limiting households' purchasing power.

In **the Democratic Republic of the Congo**, according to the latest IPC analysis, released in October 2022, 26.4 million people (about 26 percent of the analysed population) were estimated to experience acute food insecurity (IPC Phase 3 [Crisis] or above) between July and December 2022. About 22.6 million people were classified in IPC Phase 3 (Crisis) and 3.8 million in IPC Phase 4 (Emergency). In addition, a serious nutritional situation IPC Phase 3 (Crisis) was observed in 81 out of the 519 "health zones" and a critical nutritional situation (IPC Phase 4 [Emergency]) in 19 "health zones". In **the Central African Republic**, according to the November 2022 IPC analysis, 2.7 million people (about 44 percent of the analysed population) are estimated to be in IPC Phase 3 (Crisis) and above between September 2022 and March 2023, including 642 000 in IPC Phase 4 (Emergency). This situation is also a consequence of floods that caused people displacements, damaged standing crops and prevented access to fields. In **Cameroon**, according to the November 2022 CH analysis, about 3.6 million people (13 percent of the analysed population) were estimated to be acutely food insecure (CH Phase 3 [Crisis] and above) between October and December 2022.

Table 7. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Central Africa	5.9	5.8	5.9	1.7	1.9	1.7	7.7	7.7	7.6	-1.4
Cameroon	3.5	3.4	3.5	0.3	0.3	0.3	3.8	3.7	3.8	+2.2
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.2	0.2	-5.6
Democratic Republic of the Congo	2.2	2.2	2.2	1.4	1.6	1.4	3.6	3.8	3.6	-4.8

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

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

EAST AFRICA

Famine expected in Somalia due to unprecedented multiseason drought

In **Somalia,** northern and eastern **Kenya,** and southern **Ethiopia**, a prolonged drought, which began in late 2020 and is assessed as the worst in the last 40 years, has severely affected livelihoods of local populations. In consideration of the forecasts pointing to a poor 2023 March–May rainy season, food insecurity conditions are expected to continue to deteriorate.

In **Somalia**, in August 2022, famine was projected to occur in Baidoa and Burhakaba districts of Bay Region between October and December, unless humanitarian assistance was not urgently scaled up. During the same period, about 6.7 million people (over 40 percent of the total population) were estimated to face severe acute food insecurity at national level. This figure included about 300 000 people in IPC Phase 5 (Catastrophe) levels of acute food insecurity and was almost double the estimate of late 2021. In northern and eastern pastoral, and marginal agriculture areas of **Kenya**, the number of acute food insecure people is estimated at 4.4 million between October and December 2022, almost 90 percent higher on a yearly basis. In southern regions of **Ethiopia** (SNNP, Oromia and Somali regions), the drought is affecting more than 8 million people, with 4.1 million people estimated to be severely food insecure only in the Somali Region, up 25 percent from the previous year.

According to the 2022 Humanitarian Response Plan, about 20.4 million people are estimated to be severely food insecure in **Ethiopia**, 2.4 million more than the previous year. The worsening situation is driven, in addition to the drought in southern areas, by the conflict in northern Tigray Region and in adjacent areas of Amhara and Afar regions, with 5.3 million people estimated to be severely food insecure in the Tigray Region alone. In **South Sudan**, about 6.3 million people are expected to face severe acute food insecurity between December 2022 and March 2023, a year-on-year decline of 8 percent, but still more than half of the total population. Major concerns exist for households in Jonglei State and Pibor Administrative Area, where about two-thirds of the population are expected to face severe acute food insecurity, including 33 000 people in IPC Phase 5 (Catastrophe). The main drivers are the protracted macroeconomic crisis resulting in rampant inflation, insufficient food supplies, livelihood losses in the areas affected by floods and the escalation of violent events by organized groups. In **the Sudan**, about 7.7 million people are estimated to be acutely severely food insecure between October 2022 and February 2023, about 20 percent more on a yearly basis. The high prevalence of acute food insecurity is mainly caused by persistently high inflation rates, tight food supplies due to the below-average 2021 harvest and the escalation of intercommunal violence, mainly in Greater Darfur and Greater Kordofan regions, and in Blue Nile State.

Poor rains severely affected crops and livestock in Somalia, Kenya and Ethiopia

In southern parts of the subregion, harvesting of the 2022 second season cereal crops has recently started in bimodal rainfall areas covering most of **Uganda** and southern **South Sudan**, while the harvest will take place in early 2023 in northeastern **United Republic of Tanzania** ("Vuli"), **Somalia** ("Deyr") and marginal and coastal agricultural areas of southeastern **Kenya** ("short-rains"). The October–December seasonal rains have been poor, especially in **Somalia**, northern and eastern **Kenya**, and southern **Ethiopia**. As of mid-November, cumulative rains in most key cropping areas of central and southern **Somalia,** and in marginal agricultural areas of southeastern and coastal **Kenya** were less than half of the long-term average, causing delays and a reduction in plantings, and widespread germination failures. As weather forecasts point to below-average rains for the remainder of the growing season, crop prospects are unfavourable in both areas, which is likely to result in a fifth and a fourth consecutive season with a reduced cereal production in Somalia and southeastern Kenya, respectively. In pastoral and agropastoral areas of southern **Ethiopia**, central and northern **Somalia,** and northern and eastern **Kenya**, where the exceptionally

Table 8. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[I]			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
East Africa	6.2	6.2	6.1	46.0	43.7	43.6	56.5	54.9	54.5	-0.7
Ethiopia[II]	5.1	5.2	5.0	22.8	22.7	21.6	28.1	28.2	26.8	-4.9
Kenya	0.3	0.3	0.3	3.9	3.4	3.4	4.4	3.9	3.9	-0.2
Uganda	0.0	0.0	0.0	3.6	3.4	3.3	3.8	3.6	3.5	-2.3
United Republic of Tanzania	0.1	0.1	0.1	7.4	7.6	7.0	11.0	11.7	10.9	-6.6

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

[I] Total cereals includes 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.

prolonged drought since late 2020 has resulted in widespread animal deaths, poor October–December rains hampered the regeneration of rangeland and water resources, fostering only a marginal improvement of livestock body condition.

Seasonal rains were below average also in other areas of the subregion, but rainfall deficits, and hence cereal production shortfalls, were less substantial. Below-average rains have affected "Vuli" crops in bimodal rainfall areas of **the United Republic of Tanzania**, while in **Uganda** production prospects are generally favourable as the cumulative precipitation amount was below average in some areas, but generally sufficient for crop establishment and development. In southern bimodal rainfall areas of the Greater Equatoria Region of **South Sudan**, adequate rains benefited yields. However, floods in key producing Western Equatoria State resulted in localized crop losses. In **Rwanda** and **Burundi**, where harvesting of the "2023A" season crops has recently started, below-average seasonal rains have constrained yields.

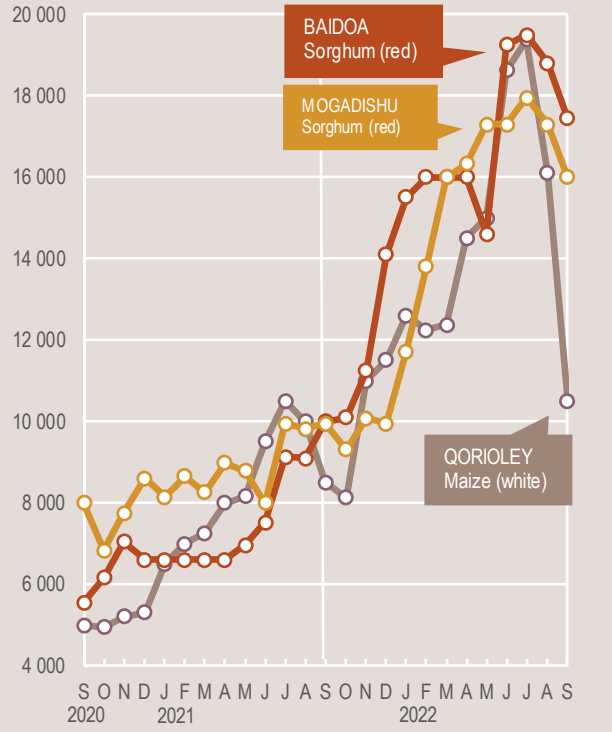
In northern parts of the subregion, including **the Sudan**, central and northern **South Sudan**, **Ethiopia**, **Eritrea** and central and western **Kenya**, harvesting of the 2022 main season cereal crops is underway. In **the Sudan**, following average rains at the start of the season, abundant precipitation in August triggered widespread floods and caused localized crop losses. Although prices of agricultural inputs were about twice the level of the previous agricultural season, the area planted with sorghum and millet is estimated to be near average. In northern and central unimodal rainfall areas of **South Sudan**, good rains since July offset the early seasonal rainfall deficits and boosted yield prospects. Concurrently, the heavier rains also exacerbated floods caused by river overflows, mainly impacting Northern Bahr el Ghazal, Warrap and Unity states. Increasing frequency of violent incidents by local organized groups continued to disrupt agricultural operations, especially in Upper Nile, Jonglei, Unity and Warrap states. In **Ethiopia,** above-average rains between June and September benefited vegetation conditions and boosted yields in key producing areas of the western highlands. The resumption of fighting in late August in Tigray Region and in neighbouring areas of Amhara Region caused disruptions to agricultural operations with negative effects on the cereal output. The recently signed ceasefire came into effect about one month after the start of the harvest. In **Eritrea**, cereal production prospects are favourable as the 2022 "Kiremti" rains, which extend from late June to September, have been above average and well distributed. In the key growing areas of Rift Valley and Western provinces of **Kenya**, which account for the bulk of the national maize output, maize production is officially forecast at 10–15 percent below the average due to the delayed onset of seasonal rains and prolonged dry spells during the critical growth stages.

The subregion's 2022 aggregate cereal output, including a forecast for the second season, is preliminarily estimated at 52.8 million tonnes, similar to the previous year's level and 4 percent below the past five-year average.

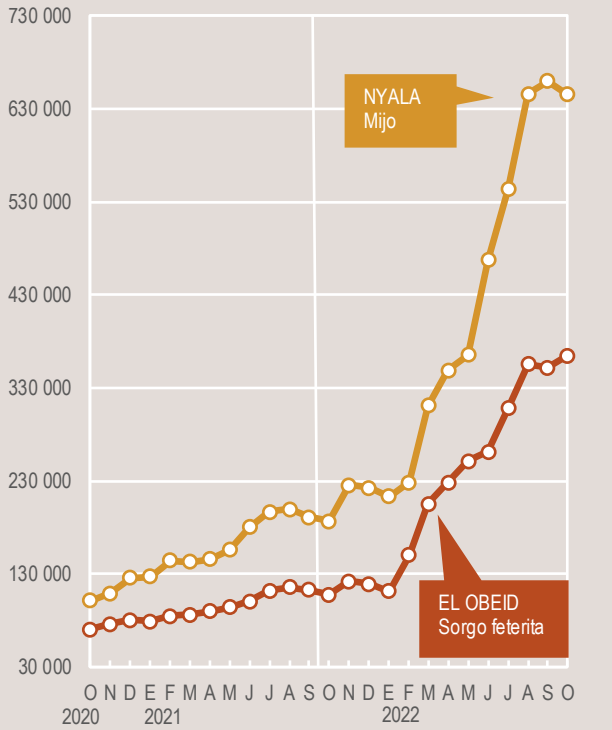
Prices of coarse grains at exceptionally high levels in Somalia, South Sudan and the Sudan

In several markets of **Somalia**, including the capital, Mogadishu, prices of maize and sorghum declined seasonally between July and September by 10–50 percent. However, in September, prices of maize and sorghum were still up to 45 and 75 percent, respectively, higher year on year mainly due to low supplies after four consecutive below-average harvests. The

Retail prices of maize and sorghum in Somalia
(Somali shilling/kg)

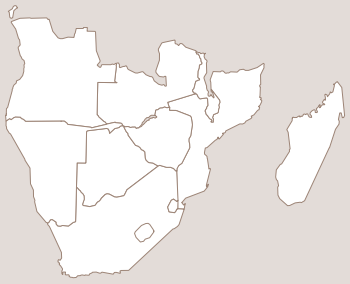


Precios al por mayor de cereales seleccionados en el Sudán
(Libra sursudanesa/kg)



highest year-on-year increase for sorghum was recorded in Baidoa, one of the two districts where famine is expected. In **South Sudan's** capital, Juba, prices of maize surged by almost 70 percent between June and September 2022, while prices of sorghum more than doubled as seasonal patterns were compounded by a significant depreciation of the national currency on the parallel market. Prices of maize and sorghum declined in October by 5–10 percent on a monthly basis, with the commercialization of the first season crops and a moderate appreciation of the national currency on the parallel market. Prices of coarse grains in October were still double their year-earlier values, reflecting the effects of the protracted difficult macroeconomic situation and low domestic supplies. In **the Sudan**, prices of domestically produced sorghum and millet have followed a sustained increasing trend since early 2022 and by September were up to four times their already elevated year-earlier values. The surge in prices and exceptionally high levels are mainly due to tight supplies, the continuous depreciation of the national currency and soaring prices of agricultural inputs that increased agricultural production costs. In **Ethiopia**, prices of locally-produced maize have increased near-continuously throughout 2022. Prices in October were about 20 percent higher than their year-earlier levels, largely reflecting the depreciation of the national currency. In the Sudan and Ethiopia, prices of wheat, mostly imported, were at near-record to record levels, due to high international prices.

SOUTHERN AFRICA



Good rains forecast, but high input costs weigh on production expectations in 2023

Planting of the 2023 cereal crops is underway and the main harvest period is anticipated to start from April 2023. Except in South Africa, estimates of the area planted will only be available early next year. In **South Africa**, early planting intentions point to an above-average maize area, although farmers are still expected to plant less than the previous year. The foreseen year-on year area contraction reflects the challenges farmers are facing with agricultural inputs, both the high costs and the effects of supply chain disruptions following the outbreak of the war in Ukraine. Counteracting some of these downside risks and contributing to the still above-average area expectations are the high crop prices, with wholesale maize prices more than 50 percent up on a yearly basis in October 2022. These factors are also affecting farmers in neighbouring countries, where steep currency depreciations in 2022, most notably in **Malawi** and **Zimbabwe**, have intensified the spill-over effects of high international input prices, pushing agricultural production costs even higher. The area planted with the 2023 cereal crops by small-scale farmers, which dominate the agriculture sector in the subregion, is expected to remain almost unchanged compared to 2022 and above the previous five-year average. However, yield prospects are uncertain due to the high prices of fertilizers and access constraints, raising the risk of potentially lower cereal harvests in 2023.

The weather outlook between November 2022 and March 2023 indicates a higher-than-normal likelihood of above-average rainfall amounts across most of the subregion, influenced by the prevailing La Niña event. Precipitation forecasts in northern areas of **Zambia** and **Mozambique**, and coastal areas of **Angola**, show likely lower-than-average amounts until January, signalling possible delays in planting activities. However, cumulative rainfall amounts in October and November 2022 have been generally abundant and, if these conditions continue, it would bolster yield prospects in 2023, notwithstanding the impact of potentially lower fertilizer usage.

Subregional production remains above average in 2022

Total cereal output in the subregion is pegged at 38.5 million tonnes in 2022, 5 percent higher than the previous five-year average, but about 10 percent less than the record high of 2021. Above-average cereal outturns were estimated in **Madagascar**, **Malawi** and **South Africa**, where weather conditions in the main producing areas were broadly conducive

Table 9. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Southern Africa	2.3	2.9	2.6	30.2	34.9	30.7	4.4	5.2	5.2	36.8	42.9	38.5	-10.2
excl. South Africa	0.4	0.6	0.4	14.5	17.3	14.3	4.4	5.2	5.2	19.3	23.0	19.8	-13.9
Madagascar	0.0	0.0	0.0	0.2	0.2	0.2	3.8	4.6	4.6	4.1	4.8	4.8	-0.0
Malawi	0.0	0.0	0.0	3.7	4.7	3.9	0.1	0.1	0.1	3.9	4.9	4.0	-17.9
Mozambique	0.0	0.0	0.0	2.4	2.0	2.3	0.4	0.4	0.4	2.8	2.4	2.7	+11.9
South Africa	1.9	2.3	2.2	15.7	17.6	16.5	0.0	0.0	0.0	17.6	19.9	18.7	-5.9
Zambia	0.2	0.2	0.2	3.1	3.7	2.8	0.0	0.1	0.1	3.3	4.0	3.0	-22.9
Zimbabwe	0.2	0.3	0.1	1.9	3.1	1.8	0.0	0.0	0.0	2.1	3.4	1.9	-44.8

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

for crop production. Conversely, substantial production downturns were registered in **Zambia** and **Zimbabwe**, with harvests at below-average levels, largely on account of an unfavourable distribution of rainfall. Elsewhere in the subregion, harvests were close to the five-year averages.

Ample stocks limit import needs in 2022/23

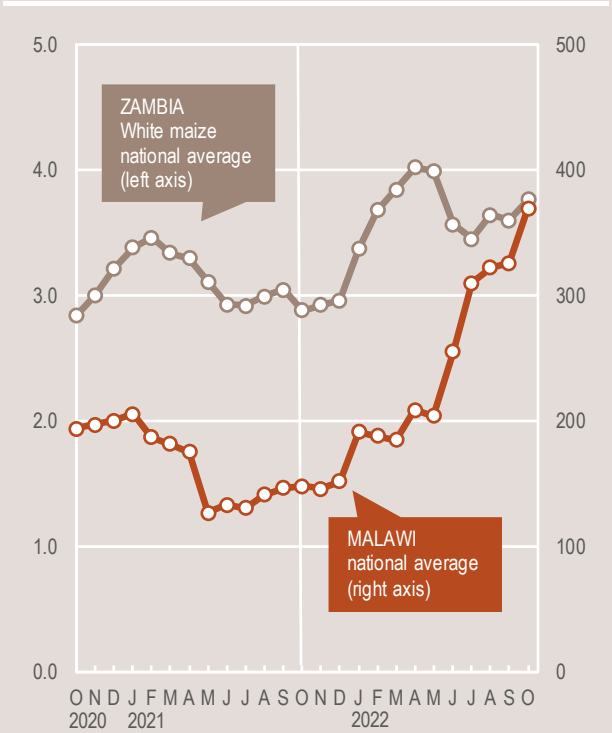
Aggregate imports are forecast to increase slightly in the 2022/23 marketing year (generally April/March) as ample stocks built-up from record harvests in 2021 are partially cushioning the effects of smaller outturns in 2022 and containing import demand. In total, cereal imports in 2022/23 are forecast at a near-average level of 8.4 million tonnes, mostly consisting of wheat, rice and maize. Reflecting the low output in 2022, the largest increase in import requirements is forecast in Zimbabwe.

Although import quantities are forecast to remain more or less stable at the aggregate level, import bills are seen increasing in 2022/23, reflecting the high international cereal prices. In addition, currency weakness in almost all countries has further increased import costs.

Price increases slowed, but levels remain high

In **South Africa**, underpinned by a depreciation of the national currency and an increase in international benchmark quotations, domestic wholesale prices of maize increased for a second consecutive month in October and reached all-time highs. However, prices were still close to export parity levels, due the ample domestic supplies. Following several months of declines since mid-2022, wholesale prices of wheat increased in October, similarly pressured by the South African rand weakness and an upturn in global prices. In **Botswana**, **Eswatini** and **Namibia**, prices of maize meal and wheat climbed modestly in September and were at higher year-on-year levels, tracking trends in the international market and particularly in South Africa, the main source of their cereal imports. In **Zambia**, the national average price of maize grain has increased seasonally since August and, in October, it was about 30 percent higher year-on-year, underpinned by the reduced harvest in 2022. Comparably, in **Malawi**, following two months of moderate price rises, the national average price of maize grain increased at a quicker pace in October and reached a record high. The currency weakness, that has exacerbated the spill-over effects of high global commodity prices and the lower year-on-year harvest, are the two principal factors that have driven maize prices upwards. In **Mozambique**, the food inflation rate was estimated at 17 percent in September. While the overall headline inflation rate was at 12 percent, above the government's target ceiling, but stable compared to the previous month, amid an increase in the benchmark interest rate to stem inflationary pressure. In **Zimbabwe**, the annual inflation rate was estimated at 340 percent in October, unchanged compared to the previous month, while the monthly rate edged up slightly to 3 percent, but remained well below the double-digit peaks reached earlier in the year. The high annual inflation rates largely reflect the impact of a persistent exchange rate depreciation, which has amplified the transmission of elevated global prices to the domestic market and the overall poor macroeconomic situation.

Maize prices in selected Southern African markets



Increased food insecurity in 2022/23

The number of people facing acute food insecurity during the peak lean period, between January and March 2023, is estimated at 16 million people, excluding South Africa, based on the IPC analysis and where the national official estimates were not available. This is above the 13 million people in need of humanitarian assistance one year before. The reduced cereal harvests and elevated prices of food commodities, coupled with the high headline inflation rates, underlie the increase in acute food insecurity, while forecast slowdowns in economic growth will impact income-earning opportunities and weigh on households' purchasing power. Amid the already high levels of public debt, governments are also expected to face severe fiscal challenges and increasing expenditure needs for social protection programmes to respond to the high inflation rates. Many countries have increased their policy interest rates, mirroring international trends. This has resulted in increased costs of servicing debts, which could divert resources and cause a cut back in public sector spending, including for agricultural support programmes, with potential negative repercussions for food security. The highest levels of acute food insecurity are forecast in **Madagascar**, **Malawi, Zimbabwe** as well as in southern provinces of **Angola**.

REGIONAL REVIEWS
ASIA

Countries with unfavourable cereal production prospects in 2022*

Sri Lanka: Shortages and high prices of agricultural inputs

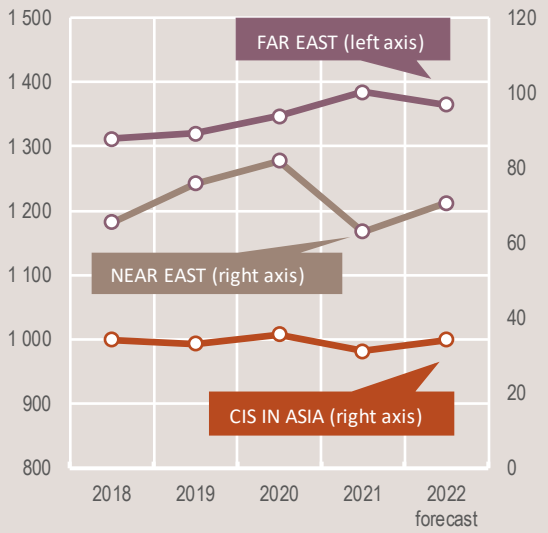
*/** See Terminology (*page 7*).
Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Source: GIEWS, 2022. *Crop Prospects and Food Situation No. 4.* Cited 2 December 2022, modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Production Overview

Total regional cereal production is pegged at a well above-average level of 1 470 million tonnes in 2022, albeit slightly lower on a yearly basis. This forecast is largely driven by sizeable production upturns in the Far East subregion, reflecting robust growth in the leading cereal producers China (mainland) and India. These large outputs more than offset reduced harvests in several countries, notably Sri Lanka, which is experiencing an economic crisis. In the Near East subregion, most countries are expected to register average or below-average harvests due to rainfall deficits, except in Türkiye, where conducive weather conditions lifted production above the five-year average. In CIS Asia, beneficial weather conditions supported a near-average cereal production in 2022. Planting of the 2023 crops has started, and preliminary data points to above-average wheat areas in the main producing countries of India and China (mainland), however, plantings in Pakistan may be curbed by the impact of floods.

Cereal production
(million tonnes)



FAR EAST

Favourable conditions for 2023 winter crops

Planting of the mostly irrigated 2023 winter wheat crop, to be harvested between March and June 2023, is nearing completion in most countries. Average to above-average precipitation amounts between September and mid-November across most main producing areas and adequate irrigation water availability have benefitted planting activities and crop germination. In **China (mainland)**, the area planted with wheat is estimated at 24.7 million hectares, an above-average level, underpinned by high domestic prices and strong demand. In **India**, the area planted is also forecast at a high level, driven by remunerative minimum support prices. In **Pakistan**, extensive flooding between June and August 2022 caused widespread loss of and damage to agricultural inputs and irrigation infrastructure, which may resulted in a contraction in the area planted with the 2023 wheat crop.

Cereal production forecast above-average in 2022

In most Northern Hemisphere countries, harvesting of the main 2022 cereal crops is ongoing and is expected to be finalized in early 2023, while planting of the secondary crops is at an early stage or will start soon. In countries in the Southern Hemisphere and along the Equator, the main season crops were harvested earlier in the year and harvesting of the 2022 secondary or tertiary crops is nearing completion.

The 2022 subregional cereal production, including an output from the secondary season crops, is forecast at 1 365 million tonnes (rice in paddy equivalent), slightly above the previous five-year average. The main season cereal outputs are forecast at average to above-average levels in most countries. Reduced crop production is expected in **Bhutan**, **the Democratic People's Republic of Korea**, **Nepal**, **Myanmar** and most pronouncedly in **Sri Lanka**, where limited availability and high prices of agricultural inputs caused steep reductions in the area planted and yields. In **Pakistan**, severe monsoon floods caused significant losses of the 2022 "Kharif" cereal crops and the output is expected to decrease sharply year-on-year.

The 2022 subregional production of paddy, the major food staple of the subregion, is forecast at 688 million tonnes, down 2 percent from the record level in 2021. Above-average outputs are forecast in **Malaysia**, **the Philippines** and **Thailand** as well as in **Bangladesh**, **Cambodia** and **India**, where, however, the outputs are forecast to decline year-on-year. In **Indonesia**, **Viet Nam** and **Japan**, the 2022 rice output is forecast below the five-year average, while well below-average production is forecast in **Bhutan**, **the Democratic People's Republic of Korea**, **Nepal**, **Myanmar** and **Sri Lanka**. In **the Lao People's Democratic Republic**, dry weather conditions, followed by floods in August, have dampened harvest prospects, while high prices of agricultural inputs have also weighed on production expectations. A FAO/WFP Crop and Food Security Assessment Mission (CFSAM) visited the country in November to evaluate the 2022 crop production and overall food security situation.

The 2022 subregional production of coarse grains, mostly maize, is forecast at 401 million tonnes, 5 percent above the five-year average, mostly driven by an expansion in the area planted, due to the remunerative prices of maize and continued strong domestic demand. Above-average outputs are forecast in **Bangladesh**, **China (mainland)**, **India**, **Indonesia**, **Thailand** and **the Philippines**. A below-average production is forecast in **Viet Nam**, due to sowing contractions as farmers shifted to more profitable crops, as well as in **the Democratic People's Republic of Korea**. The 2022 wheat harvest finalized last June and the subregion's output is estimated at an above-average level of 276.1 million tonnes.

Table 10. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Far East	268.4	278.9	276.1	382.4	401.6	400.9	683.6	703.8	688.0	1 334.4	1 384.3	1 365.0	-1.4
Bangladesh	1.1	1.1	1.2	3.7	4.7	4.8	54.9	56.8	56.4	59.7	62.6	62.3	-0.4
Cambodia	0.0	0.0	0.0	1.0	0.7	0.7	11.1	12.2	11.5	12.1	12.9	12.2	-5.4
China (mainland)	134.1	136.9	138.4	271.6	283.1	285.3	211.8	212.8	211.9	617.5	632.8	635.6	+0.4
India	103.9	109.6	106.8	48.1	51.2	49.8	180.8	195.4	187.0	332.8	356.2	343.7	-3.5
Japan	1.0	1.1	0.9	0.2	0.3	0.2	10.6	10.5	10.3	11.8	11.9	11.5	-3.6
Myanmar	0.1	0.1	0.1	2.4	2.6	2.5	26.4	24.9	23.7	28.9	27.5	26.4	-4.2
Nepal	2.0	2.1	2.0	3.1	3.1	3.0	5.4	5.1	5.0	10.5	10.3	10.0	-2.6
Pakistan	25.7	27.3	26.1	8.5	11.2	9.5	11.9	14.0	12.0	46.1	52.4	47.6	-9.2
Philippines	0.0	0.0	0.0	8.0	8.3	8.3	19.3	19.9	20.0	27.3	28.2	28.3	+0.1
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.1	5.2	5.1	5.3	5.4	5.3	-1.7
Sri Lanka	0.0	0.0	0.0	0.3	0.5	0.2	4.2	5.1	3.1	4.5	5.6	3.3	-41.9
Thailand	0.0	0.0	0.0	4.9	5.0	5.4	31.8	33.6	34.0	36.8	38.5	39.3	+2.0
Viet Nam	0.0	0.0	0.0	4.8	4.4	4.3	43.4	43.9	42.4	48.1	48.3	46.7	-3.2

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

Cereal trade forecast well above the average in 2022/23

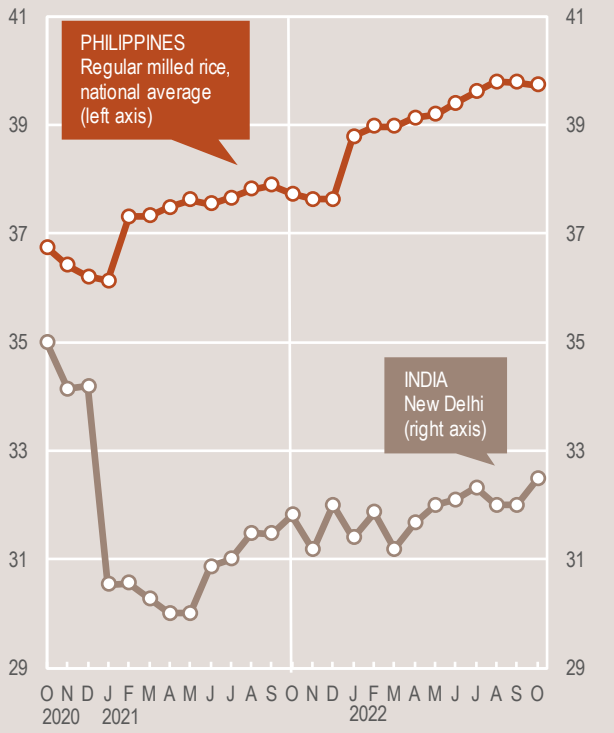
Aggregate cereal import requirements in the 2022/23 marketing year are forecast above the five-year average, at 167 million tonnes (rice in milled terms), owing to strong demand for coarse grains used primarily for feed. Total subregional wheat imports are projected at 57.4 million tonnes, 5 percent above the five-year average, reflecting expectations of increased demand from **China (mainland)**, **Bangladesh**, **Malaysia**, **Pakistan** and **the Philippines**. Imports of rice in the 2023 calendar year are forecast at 17.7 million tonnes, down 18 percent from 2022. Aggregate rice exports in the 2023 calendar year are forecast at 43.9 million tonnes, down 7.5 percent from the level in 2022.

Domestic prices of rice and wheat at high levels

Domestic prices of rice were generally above their year-earlier levels as of October 2022. In **Viet Nam**, prices increased between September and October, amid seasonally tight availabilities and robust export demand. In **Thailand**, after increasing in August and September, rice prices firmed up in October, ahead of the 2022 main season

Rice retail prices in selected Far East countries

(Philippine peso/kg) (Indian rupee/kg)



Wheat flour retail prices in selected Far East countries

(Sri Lanka rupee/kg) (Indian rupee/kg)

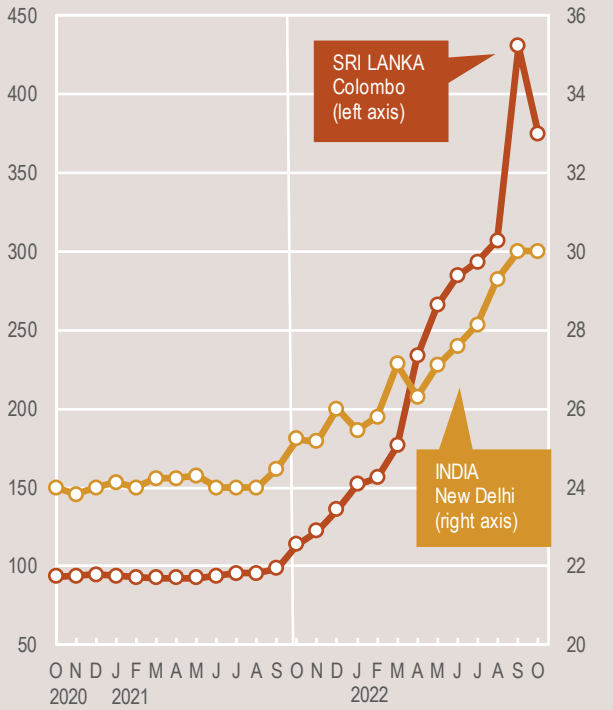


Table 11. Far East cereal production and anticipated trade in 2022/23

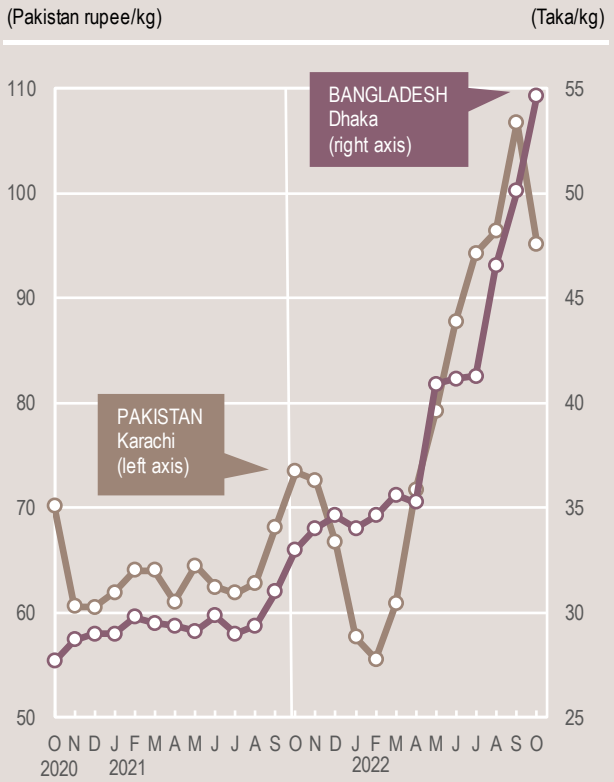
(thousand tonnes)

	5-year Avg (2017/18 to 2021/22)	2021/22	2022/23	Change: 2022/23 over 2021/22 (%)	Change: 2022/23 over 5-year average (%)
Coarse grains					
Exports	*4 776*	*7 093*	*6 175*	*-12.9*	*+29.3*
Imports	*82 379*	*99 298*	*91 937*	*-7.4*	*+11.6*
Production	*382 374*	*401 605*	*400 868*	*-0.2*	*+4.8*
Rice (millled)					
Exports	*40 997*	*46 805*	*45 643*	*-2.5*	*+11.3*
Imports	*15 140*	*17 558*	*15 895*	*-9.5*	*+5.0*
Production	*454 970*	*468 802*	*458 304*	*-2.2*	*+0.7*
Wheat					
Exports	*3 974*	*9 114*	*7 126*	*-21.8*	*+79.3*
Imports	*54 410*	*59 509*	*57 351*	*-3.6*	*+5.4*
Production	*268 435*	*278 874*	*276 117*	*-1.0*	*+2.9*

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

harvest. In the case of **Myanmar**, retail prices of the widely consumed "Emata" rice were at record levels in October, driven by high transportation and input costs as well as expectations of a below-average paddy harvest. In **China (mainland)** and **India**, domestic rice prices were generally stable, reflecting adequate market availabilities. In **Sri Lanka**, domestic prices of rice decreased seasonally for the third consecutive month in October 2022 with the "Yala" harvest. However, prices were more than two times above their year-earlier levels, mainly owing to an overall tight supply situation, due to the overall reduced output in 2022. Similarly, prices softened in **Bangladesh**, amid adequate market availabilities from the 2022 harvests and the continued distribution of rice at subsidized prices to vulnerable households. Wheat grain and wheat flour prices were also above their year-earlier levels in most countries, including **Pakistan** and **Bangladesh**, where October prices reached record or near-record levels as a result of a slowdown in imports and elevated transportation costs. In **Sri Lanka**, following a steady upward trend since September 2021, wheat flour prices declined by 13 percent month-on-month in October, after the Essential Food Commodities Importers and Traders Association announced a reduction in the price of wheat flour, reflecting softening international prices. However, October quotations remained more than five times higher than their year-earlier levels. In **India** and **China (mainland)**, wheat flour prices were stable or increased marginally, reflecting generally adequate market availabilities.

Wheat flour retail prices in selected Far East countries



Acute food insecurity increases in 2022

The aggregate number of people facing acute food insecurity has increased since early 2022, reflecting high food and energy prices, with many households still recovering from the impact of the COVID-19 pandemic. In **Sri Lanka**, **Mongolia**, **Pakistan** and **the Lao People's Democratic Republic**, the depreciation of national currencies against the United States dollar has added further inflationary pressure on food prices, with adverse impacts on food insecurity. In **Pakistan**, severe flooding in June and August 2022 had a negative impact on the livelihoods of approximately 33 million people, especially in southern parts of the country. Already, prior to the floods, the latest IPC analysis projected that 6 million people would face high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between July and November 2022. This number is expected to have increased on account of the widespread floods. In **Bangladesh**, about 1 million Rohingya refugees from Myanmar, who reside mostly in the Cox's Bazar District and the island of Bhasan Char, are highly dependent on humanitarian assistance, while monsoon floods between May and July affected a large number of people. In **Sri Lanka**, large numbers of people continue to face acute food insecurity, due to persisting economic constraints and the effects of a sharply reduced 2022 crop harvest. In **Myanmar**, the political crisis following the military takeover in February 2021 has been compromising the already difficult food security situation of Rohingya's internally displaced persons. In **the Democratic People's Republic of Korea**, the food security situation is expected to remain fragile, given the forecast of a below-average output in 2022.

NEAR EAST

Localized early season rainfall deficits hamper sowing activities

Sowing of the 2023 winter wheat and coarse grains crops is currently underway and, depending on location and soil moisture conditions, it will continue until next January. As of mid-November, precipitation amounts varied across the subregion, with early season dryness delaying sowing in many significant producing areas. The Anatolia Plateau in **Türkiye** received about 70 percent of the average rainfall amount between mid-August and mid-November. Similar rainfall deficits were estimated in the main rainfed cereal producing areas of **the Syrian Arab Republic** (Aleppo, Raqqa and Hassakeh governorates) and in the Ninewah Province, a significant rainfed production area of **Iraq.** These areas were already affected by two years of consecutive droughts and there is an increased likelihood of below-average rainfall amounts between November 2022 and February 2023. In **Afghanistan**, the first significant rainfall occurred in the first decade of November, slightly later than normal. Moisture levels in cropping areas along the Mediterranean coast, in most parts of **the Islamic Republic of Iran** and in southern **Iraq** were deemed adequate to facilitate planting as of the first decade of November.

Farmers' access to inputs in countries already experiencing difficult socioeconomic circumstances due to conflicts and/or economic crises, including **Afghanistan, the Syrian Arab Republic, Yemen** and **Lebanon**, are likely to be further constrained by the lack of liquidity and high input prices.

Close-to-average cereal production in 2022

In the subregion, total cereal production in 2022 is estimated at 70.6 million tonnes, about 0.5 million tonnes below the previous five-year average, but about 12 percent above the drought-affected output in 2021. The partial production recovery at the aggregate level is mostly accounted for by increases in **Türkiye** and **the Islamic Republic of Iran**. In **Türkiye**, total cereal production is officially estimated at 38.4 million tonnes in 2022, over 20 percent above the previous year and 10 percent above the five-year average. Similarly, in **the Islamic Republic of Iran**, cereal production recovered and is estimated at 20.8 million tonnes, an increase of 17.3 percent compared to 2021, but still slightly below the average.

In other countries, cereal production was stable or declined year-on-year, mostly on account of unfavourable weather conditions. The largest year-on-year production decline was reported in **Iraq**, where the 2022 cereal harvest is estimated at 3.4 million tonnes, almost 35 percent below the near-average harvest obtained in 2021. The decline was due to drought conditions, but also to the policy decision to halve the area planted with irrigated crops in an effort to reduce water demand amidst increasing water scarcity. The cereal output in **Afghanistan** also declined, estimated at 4.6 million tonnes, about 4 percent below the previous year's harvest and 12 percent below average. In **the Syrian Arab Republic**, cereal outturn is estimated at 1.5 million tonnes, up 6 percent on the drought-affected 2021 harvest, but representing only 50 percent of the five-year average.

The subregional cereal import requirement in the 2022/23 marketing year (July/June) is forecast at 75.7 million tonnes, about 1 percent above the five-year average, but 7 percent below the previous year's level, reflecting improved regional availabilities from domestic harvests. Despite the lower import requirements in 2022/23, elevated global food commodity prices, coupled with currency depreciations, are amplifying the food import bills. However, this impact is less prevalent in countries that export hydrocarbons, given the prevailing high commodity prices that improve their balance of payments positions.

The subregion directly benefited from the Black Sea Grain Initiative that facilitates exports from Ukrainian Black Sea ports. The inflow of wheat is particularly important for **Türkiye**, where a significant quantity of imported wheat is processed into flour and pasta which are then re-exported to **Iraq**, **Yemen**, **Somalia** and other countries.

Large number of people remain acutely food insecure

Lingering conflicts, high international commodity prices, economic downturns and reduced livelihood opportunities continue to have a significant impact on acute food security conditions in many countries. In **Afghanistan**, according to the latest IPC analysis, 18.9 million people were

Table 12. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Near East	44.0	38.2	41.4	21.6	19.7	24.2	5.5	5.0	5.0	71.1	62.9	70.6	+12.2
Afghanistan	4.4	3.9	3.8	0.3	0.3	0.3	0.6	0.6	0.5	5.2	4.8	4.6	-4.2
Iran (Islamic Republic of)	13.5	10.4	13.0	3.9	4.3	4.3	3.6	2.9	3.5	21.1	17.7	20.8	+17.3
Iraq	4.0	4.2	2.7	1.1	0.6	0.7	0.0	0.4	0.0	5.5	5.2	3.4	-34.6
Türkiye	19.7	17.7	19.8	14.1	13.3	17.7	1.0	1.0	1.0	34.8	32.0	38.4	+20.2

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

projected to face IPC Phase 3 (Crisis) or above between June and November 2022. In **Yemen**, nearly 17 million people or over 53 percent of the population, are classified in IPC Phase 3 (Crisis) or worse between October and December 2022. Of primary concern, is 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. No recent IPC-type assessments have been conducted in **the Syrian Arab Republic** and **Lebanon**. The latest estimates for **the Syrian Arab Republic**, conducted following the WFP's Consolidated Approach for Reporting Indicators of Food Security (CARI) methodology, put the number of people facing acute food insecurity at about 12 million in June 2021, a slight decline compared to 2020. In **Lebanon**, according to WFP's surveys conducted in September and December 2021, almost 1.8 million Lebanese citizens (46 percent of the total population) and 735 000 Syrian refugees (49 percent of the total Syrian refugee population) were estimated to be acutely food insecure in 2021. However, in both countries, the ongoing economic challenges continue to erode the purchasing power of the population, with negative consequences on the overall food security situation.

CIS IN ASIA

Dry weather conditions forecast in coming months may affect 2023 winter cereal crops in eastern countries

Planting of the 2023 winter cereal crops, mainly wheat, to be harvested from June next year, took place in October and November 2022. At aggregate subregional[3] level, early indications point to an area planted to winter cereals similar to the previous five-year average.

Following drier-than-average weather conditions in September 2022, precipitation amounts increased in October until mid-November, boosting soil moisture levels across the subregion. Adequate rainfall amounts in the coming months are needed for proper crop establishment and development, and to ensure water reservoirs for irrigation in summer months (June–September). However, according to prevailing weather forecasts, there is high likelihood of below-average cumulative precipitation levels in the subregion between late November 2022 and February 2023 in the eastern part of the subregion. This is consistent with the typical drying impacts of the La Niña event, which is expected to persist for a third consecutive year.

Near-average cereal production in 2022

Harvesting of the 2022 winter cereals finalized in August, while harvesting of the spring crops was completed in October. Total subregional cereal production is estimated at a near-average level of 33.8 million tonnes in 2022. Wheat output, accounting for about 70 percent of the total cereal production, is estimated at 24.6 million tonnes, slightly above the five-year average as a large output in **Kazakhstan** more than offset the reduced harvests in **Armenia**, due to below-average plantings, and in **Turkmenistan**, following drier-than-average weather conditions during the season. In **Kazakhstan**, the main cereal producing country in the subregion, wheat production is set at 13.7 million tonnes, about 4 percent above the five-year average, due to large

Table 13. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
CIS in Asia	24.0	22.0	24.6	8.7	7.9	8.5	33.7	31.0	34.2	+10.0
Armenia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.3	+64.7
Azerbaijan	2.0	1.9	2.0	1.3	1.5	1.3	3.3	3.4	3.3	-1.4
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	-13.4
Kazakhstan	13.3	11.8	13.7	4.8	3.8	4.4	18.5	16.2	18.6	+15.3
Kyrgyzstan	0.6	0.4	0.6	1.1	0.8	1.1	1.7	1.3	1.8	+41.7
Tajikistan	0.8	0.9	0.8	0.4	0.4	0.4	1.3	1.4	1.3	-5.2
Turkmenistan	1.1	0.9	1.1	0.1	0.1	0.1	1.3	1.1	1.3	+17.9
Uzbekistan	5.9	6.0	6.1	0.7	0.9	0.8	6.9	7.1	7.2	+0.1

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

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

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

plantings and overall favourable weather conditions. The aggregate subregional production of barley is estimated at 5 million tonnes, 5 percent below the average, due to reduced plantings in **Kazakhstan,** amid weak demand from importing countries.

Cereal exports forecast at below-average levels in 2022/23

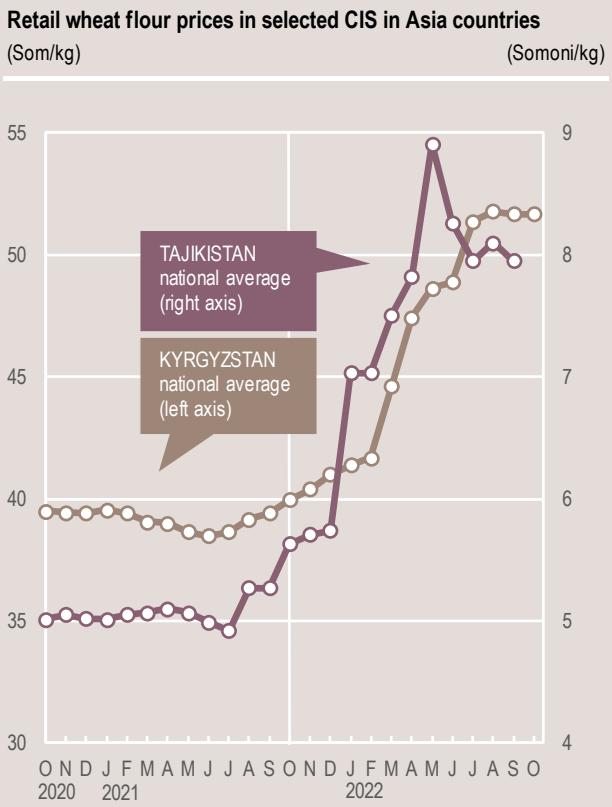
In the 2022/23 marketing year (July/June), subregional cereal exports, mainly wheat, are forecast at 9.1 million tonnes, 8 percent below the five-year average. Wheat shipments are projected at a near-average level of 8.4 million tonnes, while barley exports are anticipated at 600 000 tonnes, well below the previous five-year average on account of lower export expectations from **Kazakhstan**, the leading exporter in the subregion.

Total subregional import requirements of cereals, mainly wheat, in the 2022/23 marketing year (July/June) are forecast at a near-average level of 9.1 million tonnes, as reduced import needs from **Azerbaijan**, **Tajikistan** and **Uzbekistan** are expected to offset the increased import demand for wheat from **Armenia** and **Turkmenistan**, reflecting reduced domestic wheat harvests.

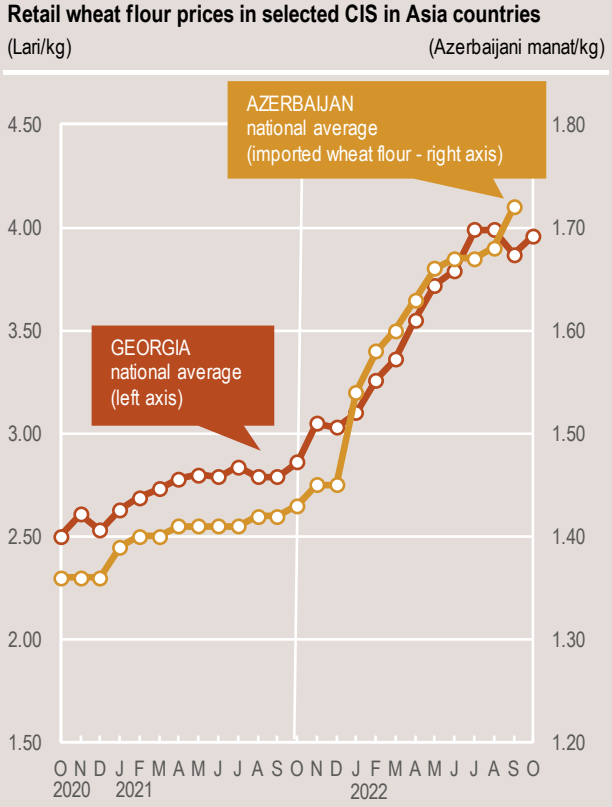
Domestic prices of wheat flour higher than a year earlier

Domestic retail prices of wheat increased sharply since February 2022 in most importing countries and as of October 2022 were at higher year-on-year levels. The steep increases predominantly reflect the outbreak of the war in Ukraine that triggered a surge in international wheat export quotations and caused an uptick in consumer demand, amid fears of supply shortages. Further upward pressure came from the elevated fuel prices, which raised production and transportation costs. In **Georgia**, national average wheat flour prices increased sharply between January and July 2022 and remained overall stable in the following months until October, reflecting trends of export quotations in the Russian Federation, the main source of wheat for the country. In **Kyrgyzstan** and **Tajikistan**, prices increased from March to May 2022, but remained stable or declined slightly thereafter. The good wheat outputs in Georgia, Kyrgyzstan and Tajikistan contributed to averting more substantial price increases in recent months. Between January and September 2022, wheat flour prices increased moderately in **Azerbaijan** and **Uzbekistan**, while they remained generally stable in **Armenia**.

Retail wheat flour prices in selected CIS in Asia countries



Retail wheat flour prices in selected CIS in Asia countries



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).

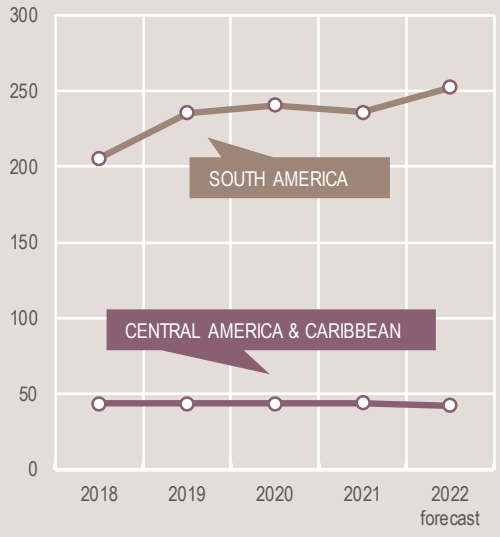
Source: GIEWS, 2022. *Crop Prospects and Food Situation No. 4.* Cited 2 December 2022, modified to comply with the United Nations map No. 4170 Rev. 19, 2022.

Production Overview

The cereal production forecast for the region stands at an all-time high of 294.6 million tonnes in 2022, 8 percent above the five-year average. The expected outturn is the result of a substantial coarse grain output in South America underpinned by large maize acreages. The larger coarse grains output is seen to more than offset a likely reduction in wheat production, is mostly concentrated in Argentina, where prolonged dryness has impaired yield prospects. In Central America, a below-average cereal output is expected on account of a low maize area.

Planting of the 2023 crop is underway, and early indications in Brazil point to a record maize acreage, reflecting remunerative prices and strong export demand. In Central America, planting of the 2023 main wheat crop recently started in Mexico and according to the official planting intention survey, the area sown is forecast at an above-average level.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat production anticipated at an above-average level in 2022

In **Mexico**, harvesting of the 2022 minor wheat crop, which accounts for about 5 percent of the entire subregional output, started in November and production is forecast at a below-average level, reflecting reduced sowings. In total, the subregional wheat output in 2022, including the above-average main season crop harvested in the second quarter of the year, is forecast at 3.6 million tonnes, more than 10 percent above the previous five-year average.

Planting of the 2023 main wheat crop has recently started in Mexico and according to the official planting intention survey, the area sown is forecast at an above-average level. Although current water reservoir levels are plentiful in the key producing northwestern region, rainfall amounts between December 2022 and February 2023 are forecast at below-average levels and if these materialize yield potentials could be constrained.

Maize production expected slightly below the average in 2022

The aggregate subregional maize output is forecast at 39.96 million tonnes in 2022, 6.3 percent below the five-year average. In **Mexico**, the leading maize producer in Central America, the main season crop is currently being harvested and production is forecast at a below-average level, a result of low plantings caused by dry weather conditions. In total, maize production in Mexico, including a reduced output from the earlier-harvested minor season crop, is pegged at 25.5 million tonnes in 2022, a below-average level.

Elsewhere in the subregion, harvesting of the 2022 minor season maize crop is about to start. Despite heavy rainfall in October, associated with the passage of tropical storm Julia and cyclone Lisa, satellite imagery depicted average to above-average vegetation conditions in cropped areas in November. In localized areas in eastern **El Salvador**, western **Honduras**, northeastern **Guatemala** and eastern **Nicaragua**, heavy rains affected germinating crops, and in some areas, necessitated replanting of the minor maize crops. The 2022 aggregate maize output is expected to be slightly below average, as high prices of agricultural inputs constrained the extent of sowings, despite some alleviating effect from the free distribution of seeds and fertilizers by the governments.

In **Haiti**, harvesting of the 2022 second season maize and paddy crops is ongoing and below-average outputs are expected, as farmers struggled to access agricultural inputs amid reduced availabilities and elevated prices. In total, national cereal production in 2022, including the dry-weather-affected main season crop harvested earlier in the year, is forecast at a below-average level, resting on lower plantings and overall poor yield prospects. In **the Dominican Republic**, with the harvest of the second season crops nearing completion, total paddy production is estimated at an above-average level. This mainly reflects excellent yields from the first season crop that more than offset a below-average acreage in the second season.

Cereal imports forecast at high levels in 2022/23

For the 2022/23 marketing year (September/August), cereal import requirements are forecast at an above-average level of 37.5 million tonnes, including 25.1 million tonnes of maize and 9.1 million tonnes of wheat. The high level of import requirements is driven by burgeoning demand for yellow maize by the feed industry and for wheat, reflecting the increase in food consumption due to population growth.

Table 14. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
Central America and the Caribbean	3.2	3.3	3.6	37.9	37.8	35.9	2.9	2.8	2.8	43.9	43.9	42.2	-3.8
El Salvador	0.0	0.0	0.0	0.9	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	-3.8
Guatemala	0.0	0.0	0.0	2.0	2.0	2.0	0.0	0.0	0.0	2.0	2.0	2.0	-1.1
Honduras	0.0	0.0	0.0	0.7	0.6	0.7	0.1	0.1	0.0	0.7	0.7	0.7	+2.6
Mexico	3.2	3.3	3.6	33.0	33.0	31.2	0.3	0.3	0.3	36.5	36.6	35.0	-4.2
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.4	0.4	0.4	0.4	0.8	0.9	0.8	-3.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

Prices of maize and beans well above year-earlier levels

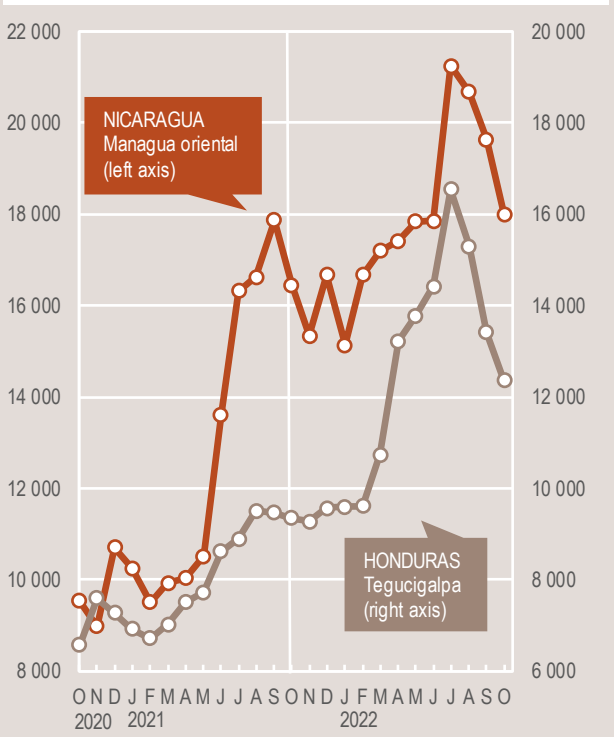
Between August and October 2022, wholesale prices of white maize in **Honduras** and **Nicaragua** declined substantially, as the main season harvest improved market supplies. To a lesser extent, prices fell in **El Salvador** and **Guatemala**. By contrast, prices increased during the August–October period in **Mexico**, pressured by unfavourable production prospects. After posting decreases in August and September, prices of red beans rose sharply in **El Salvador**, **Honduras** and **Nicaragua**, as the passage of tropical storm Julia affected the main season crops at the germination stage in early October. In **Guatemala**, despite the negative impact of the tropical storm, prices of black beans have been stable since August, with markets supplied mainly by the previous season's stock. Prices of black beans strengthened seasonally between August and October in **Mexico**, but at a relatively quick pace as upward trends were exacerbated by unfavourable production prospects. Overall, prices of white maize and beans were well above their year-earlier levels across the subregion due to elevated production and transportation costs.

In **the Dominican Republic**, retail prices of rice have been stable between January and September 2022, reflecting the effects of an above-average production in 2021 and the first half of 2022. In **Haiti**, prices of domestically produced maize meal and black beans rose in the July–September period, owing to the below-average output of the main season crop as well as high transportation costs. Further upward pressure came from civil protests and heightened insecurity that disrupted food and fuel supplies, while the weaker national currency amplified inflationary pressure, especially for imported goods.

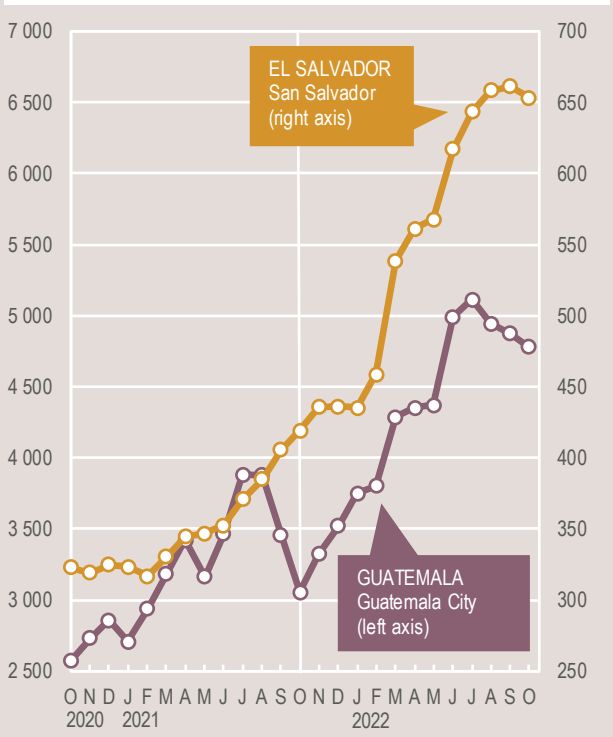
Food insecurity worsen in Haiti and Guatemala

In **Haiti**, according to the latest IPC analysis, the number of acutely food insecure people is estimated at a record level of 4.7 million between September 2022 and February 2023, up from the 4.3 million people during the same period a year earlier. The increase is caused by the impact of heightened insecurity, political turmoil and natural hazards. Of particular concern are the estimated 19 000 people located in Cité Soleil commune of the capital city who are classified, for the first time, in IPC Phase 5 (Catastrophe), as a result of gang violence that has severely affected their access to markets and essential services. In October 2022, an outbreak of cholera is likely to exacerbate the already fragile situation given households' generally poor access to water, sanitation and hygiene services. Food security conditions have also worsened in **Guatemala**, where the number of people facing acute food insecurity is estimated at 3.2 million between October 2022 and February 2023, a substantial increase from the 2.5 million people estimated in 2021/22. The deterioration is primarily due to high prices of food and fuel that have constrained food access of the most vulnerable households.

Wholesale white maize prices in selected Central America countries



Wholesale white maize prices in selected Central America countries



SOUTH AMERICA

Official forecasts point to well above-average maize plantings for 2023 crop

Planting of the 2023 first season maize crop is ongoing in Argentina and Brazil. In **Brazil**, generally favourable weather conditions have supported germination and early development of the first minor season crop in key producing southern regions. Average rainfall amounts are forecast from January 2023 onwards, which are expected to support planting operations of the second season main crop. Despite concerns over the impact of the high production costs on plantings, official forecasts point to a record-high maize area of 22.3 million hectares for the 2023 crop, underpinned by high crop prices, and strong export and domestic demand. In **Argentina**, weather forecasts indicate a continuation of drier-than-average conditions in December, raising concerns for the early season crops; below-average rainfall amounts since August 2022 had already slowed planting operations. Precipitation amounts are expected to improve from January 2023 onwards, portending to better prospects for the late season crop varieties that are normally planted in the first quarter of the year. Overall, the total area sown with the 2023 maize crop is officially forecast at an above-average level of 10.2 million hectares, driven by strong export demand.

All-time high maize production in 2022

The 2022 subregional maize production is estimated at a record level of 185.9 million tonnes, reflecting large planted areas in the main producing countries. In **Brazil**, where maize sowings have increased sharply since 2019, in response to high prices and strong demand, this upward trend continued in 2022. With average yields, total maize production in Brazil is estimated at a record high of 112.8 million tonnes in 2022. In **Argentina**, maize production in 2022 is estimated at 59 million tonnes, 10 percent above the previous five-year average, as record-high plantings more than offset below-average yields of the early-planted crops that were affected by dryness. Similarly, large plantings resulted in above-average maize outputs in **Colombia**, **Paraguay** and **Uruguay**. By contrast, maize harvests are estimated to be below average in **Bolivia (Plurinational State of)** and **Chile** on account of lower plantings, while maize outturns are estimated to be near the five-year average in **Ecuador** and **Peru**.

Harvesting of the 2022 wheat crop is ongoing and the subregional output is forecast at a below-average level of 26.6 million tonnes. The reduced output mainly reflects a production dip in **Argentina**, the leading subregional producer, where prolonged dry weather conditions curtailed both sowings and crop yields. As a result, production is officially forecast at 13.4 million tonnes, more than 30 percent below the five-year average and the lowest in the last seven years. A low wheat output is also expected in **Chile** on account of reduced sowings. By contrast, the wheat harvest in **Brazil** is estimated at an all-time high in 2022, underpinned by above-average yields and a record wheat acreage, as farmers reacted positively to the elevated domestic prices. Above-average wheat harvests are anticipated in **Paraguay** and **Uruguay**, due to a price-driven expansion in plantings. In Uruguay, dry weather conditions between September and October affected crops at flowering and crop-filling stages, and constrained yield potentials.

Table 15. South America cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
South America	28.8	33.1	26.6	174.6	177.0	202.0	25.0	25.9	23.8	228.5	235.9	252.4	+7.0
Argentina	19.5	22.1	13.4	61.2	70.0	67.4	1.3	1.5	1.2	82.0	93.5	82.0	-12.3
Brazil	5.8	7.7	9.5	97.1	90.8	117.5	11.6	11.8	10.8	114.4	110.2	137.8	+25.0
Chile	1.3	1.1	1.2	1.7	1.5	1.4	0.2	0.1	0.1	3.2	2.8	2.7	-3.4
Colombia	0.0	0.0	0.0	1.4	1.5	1.6	2.8	2.9	2.5	4.2	4.4	4.1	-6.2
Peru	0.2	0.2	0.2	1.8	1.9	1.9	3.4	3.5	3.4	5.3	5.6	5.4	-2.5

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

Paddy (rice) harvests have already been concluded in most countries and the aggregate 2022 paddy production is estimated at a below-average level of 26.6 million tonnes, mainly due to a contraction in plantings in leading producers **Brazil**, resulting from unfavourable weather, and **Colombia**, on account of low prices.

Cereal exports forecast to reach a record high in 2022/23

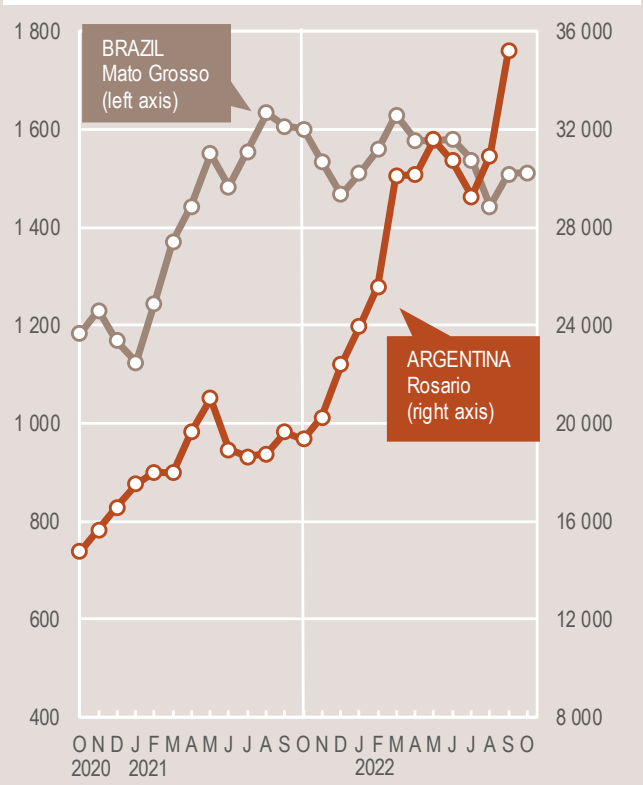
Aggregate cereal exports in the 2022/23 marketing year (March/February) are forecast at a record level of 101.9 million tonnes. This primarily reflects the all-time high maize output and, therefore, ample exportable surpluses that underpin expectations of a 25 percent increase in maize exports compared to the five-year average.

Prices of wheat and yellow maize higher year-on-year

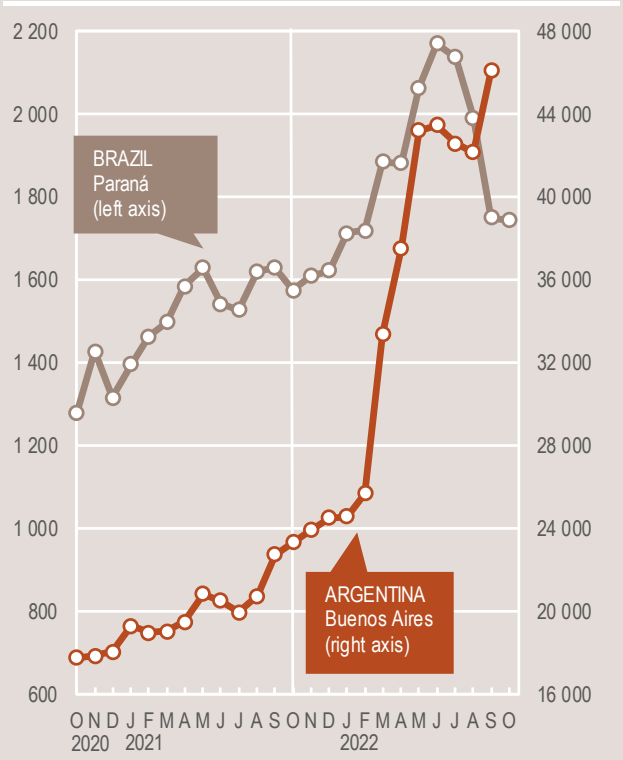
Prices of wheat weakened or stabilized between August and October after the sharp increases in the previous months, reflecting relatively flatter trends in the international market. The notable exception was **Argentina**, where unfavourable production prospects exerted strong upward pressure in September and October. Elsewhere in the subregion, prices in October were well above year-earlier values, on account of the still high global wheat prices.

Prices of yellow maize exhibited mixed trends in the August–October period and were mostly up from a year earlier, supported by elevated production costs and high international quotations. Prices were lower year-on-year only

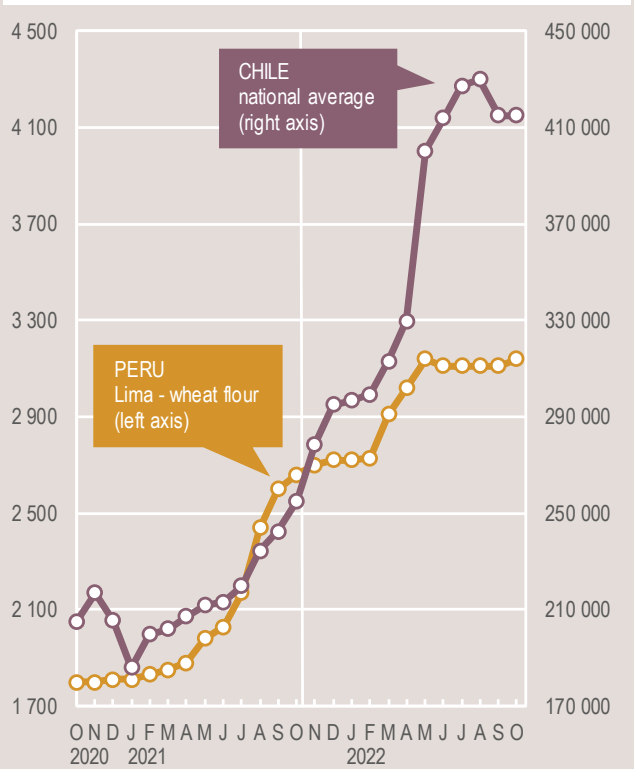
Wholesale maize prices in selected countries in South America



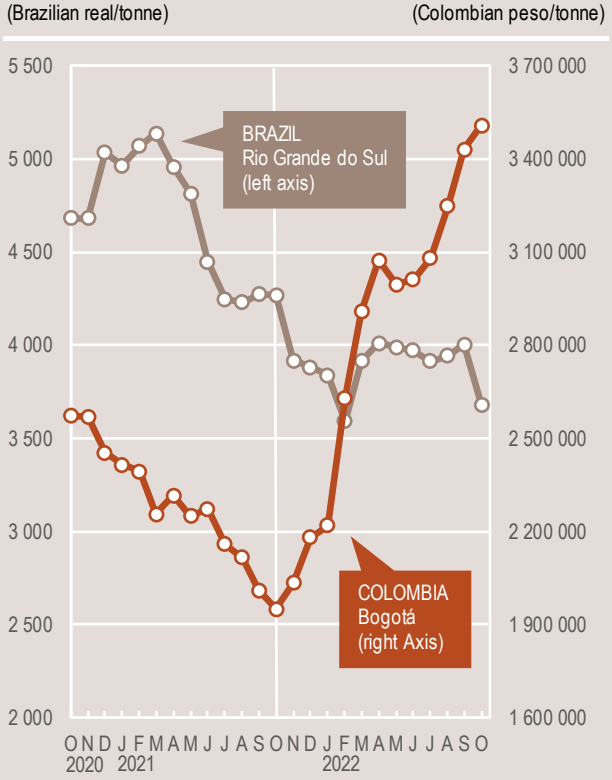
Wholesale wheat prices in selected countries in South America



Wholesale wheat prices in selected countries in South America



Wholesale rice prices in selected countries in South America



in **Brazil**, as the record 2022 maize output increased market availabilities. Maize prices rose for the third consecutive month in October in **Argentina** and **Chile**, while they weakened seasonally in **Colombia** and **Ecuador**.

In recent months, despite the ongoing main harvest, prices of rice strengthened in **Colombia** as high production costs and expectations for a below-average output exerted upward pressure on prices. By contrast, prices continued to fall in **Peru**, with markets adequately supplied with the main season output. In the capital city of **Brazil**, a stable period in mid-2022, prices rose in October owing to large export sales.

More than 3 million refugees and migrants from the Bolivarian Republic of Venezuela in need of food assistance

As of September 2022, the number of refugees and migrants from **the Bolivarian Republic of Venezuela** was estimated at 7.1 million, as a result of the severe and prolonged macroeconomic crisis in the country. The largest populations of Venezuelans are in neighbouring countries of Colombia (2.48 million), Peru (1.49 million), Ecuador (0.5 million), Chile (0.44 million) and Brazil (0.36 million). According to the 2022 Refugee and Migrant Needs Analysis, issued in October 2022, the number of Venezuelan refugees and migrants in need of food assistance is estimated at 3.16 million in 2022. The rising food inflation rates in host countries has also exacerbated vulnerability of Venezuelan migrants and refugees, limiting their access to food.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

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

NORTH AMERICA
Canada, United States of America
Cereals (winter season): Dormant

EUROPE
Northern Europe
Cereals (winter season): Dormant
Centre-southern Europe
Cereals (winter season): Establishment
CIS in Europe:
Cereals (winter season): Establishment to dormant

OCEANIA
Australia
Cereals (winter season): Harvesting

Source: GIEWS, 2022. *Crop Prospects and Food Situation No. 4.* Cited 2 December 2022, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

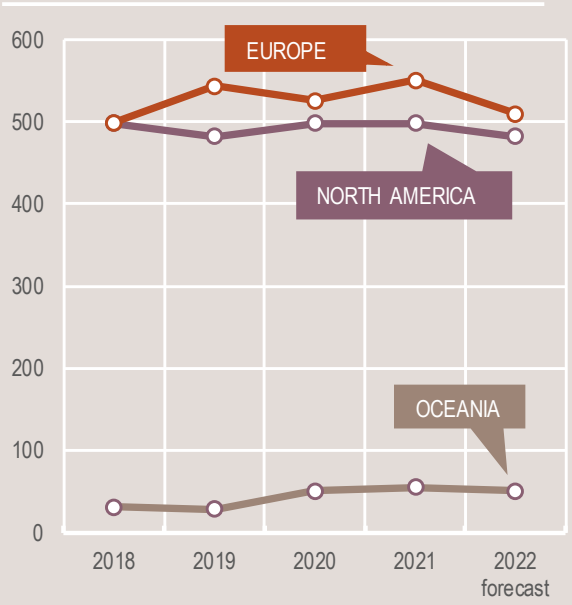
Production Overview

In the United States of America, 2022 cereal production is forecast below the five-year average, as drought curbed yields, particularly affecting the maize crop. Planting of the 2023 crop is underway and rainfall deficits are persisting, raising early concerns over winter wheat crop conditions. In Canada, cereal production in 2022 is forecast to recover strongly from the drought-reduced 2021 level, largely driven by a substantial upturn in wheat production.

Cereal production in the European Union is estimated at a below-average level, owing to the impact of rainfall shortages and higher-than-average temperatures. Amid broadly conducive weather conditions, planting of the 2023 winter wheat crop is ongoing in southern countries, having already concluded in northern states.

In Oceania, harvesting of the 2022 wheat crop is underway in Australia and the country is expected to produce the second largest output on record, supported by prospects of well above-average yields.

Cereal production
(million tonnes)



NORTH AMERICA

Drought continues to affect winter wheat areas in 2022/23

In **the United States of America**, planting of the 2023 winter wheat crop proceeded at a quick pace and was almost complete as of mid-November. Drought conditions are affecting about three-quarters of the recently planted wheat crop, leading to generally lower-than-average crop conditions. The weather outlook points to a higher-than-normal likelihood that drought conditions will persist in the main producing states of Kansas, Oklahoma and Texas until early next year, while some improvements are expected in other key producing areas.

Cereal production in 2022 is forecast at 417.5 million tonnes, 7.5 percent below the previous five-year average and 34 million tonnes down on a yearly basis. Drought was the main driver of the overall production decline, as dryness curtailed yield potentials. In total, maize production is forecast at 353.8 million tonnes, about 8 percent below the average, in particular due to low yields in Midwestern states and a decline in plantings. Wheat production is pegged at 44.9 million tonnes, marginally higher on a yearly basis, but below the five-year average, also reflecting a reduced acreage and low yields.

In **Canada**, cereal production in 2022 is forecast at an above-average level of 64.4 million tonnes, a substantial recovery from the drought-affected output of 2021. A large wheat output is driving production expectations in 2022 and is pegged at 34.7 million tonnes, about 13 percent above the five-year average, mostly driven by an expansion in sowings. Production of coarse grains is forecast at 29.7 million tonnes, about 9 percent above the average.

EUROPE

EUROPEAN UNION

Beneficial weather for 2023 winter cereal crops

In **the European Union**, sowing of the 2023 winter wheat crop was completed in November in northern countries, while it is progressing in southern states, under generally beneficial weather conditions that are favouring crop emergence. In some areas that experienced rainfall deficits earlier in the year, including northern **Italy** and southern parts of **Spain**, increased precipitation amounts are needed to boost soil moisture reserves and improve planting conditions.

Cereal crop production in 2022 is estimated at 274.7 million tonnes, 9 percent below the previous five-year average. The reduced outturn primarily reflects the impact of rainfall shortages and higher-than-average temperatures that curtailed yields. Wheat and coarse grain outputs are estimated at levels below the five-year average.

In **the United Kingdom of Great Britain and Northern Ireland**, wheat production is estimated at 15.7 million tonnes in 2022, double the five-year average, underpinned by both an upturn in yields and plantings.

CIS IN EUROPE

Below-average 2023 wheat acreage

Planting of the 2023 winter cereal crops, mainly wheat, to be harvested from July next year, was virtually complete by late November. The area sown at the subregional level is preliminarily estimated to be about 10 percent below the previous five-year average level, due to reduced plantings in **Ukraine**. In the country, the war has continued to constrain access to fields and cause labour shortages, resulting in a 40 percent reduction of the area sown with the 2023 winter cereal crops compared to the average. Plantings are estimated at about 4.8 million hectares, including 4 million hectares of wheat. As of early November, about 3.5 million hectares of wheat had been sown, while about 6.1 million hectares had been planted with wheat as of the same date in 2021. In **the Russian Federation**,

Table 16. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	5-year Avg.	2021 estim.	2022 f'cast	Change: 2022/2021 (%)
North America	79.8	67.1	79.6	406.0	422.6	394.8	9.1	8.7	7.5	494.9	498.4	481.9	-3.3
Canada	30.6	22.3	34.7	27.1	24.5	29.7	0.0	0.0	0.0	57.8	46.8	64.4	+37.6
United States of America	49.2	44.8	44.9	378.8	398.1	365.2	9.1	8.7	7.5	437.1	451.6	417.5	-7.5
Europe	260.9	269.3	271.3	264.0	277.1	235.6	4.0	3.8	3.0	528.9	550.2	509.8	-7.3
Belarus	2.4	2.5	2.5	4.8	4.8	4.9	0.0	0.0	0.0	7.2	7.3	7.4	+0.2
European Union[1]	142.0	137.9	135.5	158.1	156.9	137.2	2.9	2.7	2.0	303.0	297.5	274.7	-7.7
Russian Federation	78.9	76.1	92.0	41.3	40.4	44.6	1.1	1.1	0.9	121.3	117.6	137.5	+17.0
Serbia	2.8	3.4	3.1	7.1	6.8	5.1	0.0	0.0	0.0	9.9	10.2	8.3	-19.2
Ukraine	27.2	32.2	20.0	43.8	53.4	31.1	0.1	0.0	0.0	71.0	85.6	51.1	-40.4
Oceania	24.7	36.8	32.7	15.0	18.4	17.5	0.4	0.4	0.7	40.1	55.6	50.9	-8.4
Australia	24.3	36.3	32.2	14.4	17.7	16.9	0.4	0.4	0.7	39.1	54.5	49.8	-8.5

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

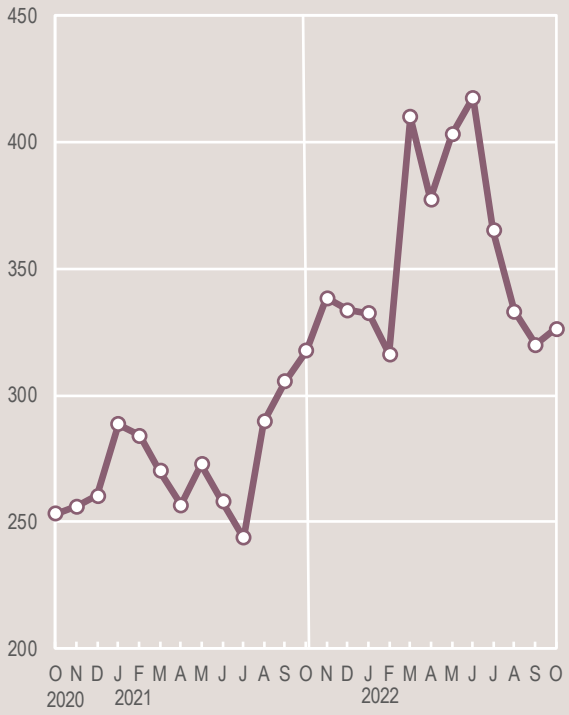
[1] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

although abundant rainfall amounts in September and October 2022 in the key-producing Volga and Central federal districts impeded planting operations, winter cereal plantings are estimated at near-average levels as weather conditions improved in November allowing some late sowing activities. In **the Republic of Moldova**, after the severe drought that affected crops and livestock in the 2021/22 season (FAO Crop and Food Supply Assessment Mission Report), favourable rainfall from August to September 2022 helped restore moisture reserves in the arable layer of the soil, improving planting conditions for winter crops in most parts of the country. However, severe moisture deficits still persist throughout the country in the lower soil layers which may adversely impact 2023 production. In **Belarus**, planting of winter cereals took place under overall favourable weather conditions.

Cereal production in 2022 estimated at a near-average level

Harvesting of the 2022 winter cereals finalized in August, while harvesting of spring crops is nearing completion. The aggregate 2022 subregional cereal production is estimated at 197.4 million tonnes, including near-average outputs of wheat, maize and barley. This result reflects a bumper output in **the Russian Federation**, which compensated for the very low harvests in **Ukraine**, due to the impact of the war, and in **the Republic of Moldova** owing to severe drought conditions.

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



Below-average cereal exports forecast in 2022/23 due to reduced shipments from Ukraine

Total subregional cereal exports in the 2022/23 marketing year (July/June) are forecast at about 87.5 million tonnes, 8 percent below the average volume. This outlook is based on expectations of lower shipments from **Ukraine**, tentatively forecast at 40 million tonnes as of mid-November. The Ukrainian export forecast includes 23 million tonnes of maize and 14 million tonnes of wheat, 8 and 23 percent, respectively, below the five-year average levels. With the closure of Black Sea ports since the start of the war in late February 2022 until July, agricultural commodities were mostly transported by rail and river, which have a significantly lower capacity compared to sea freight. With the reopening of some Ukrainian marine ports in August 2022, grain exports have increased, but the pace of exports still remains below the average of pre-war levels. By contrast, in **the Russian Federation**, cereal exports are forecast at a slightly above-average level of 47 million tonnes, including 39 million tonnes of wheat.

Russian export prices of wheat slightly above year-earlier levels

In **the Russian Federation**, export prices of milling wheat declined sharply between June and September 2022, reflecting the favourable 2022 national production prospects as well as the large domestic availabilities and the slow pace of export activity. National average prices increased by 2 percent month-on-month in October to levels slightly above year-earlier values, due to uncertainties over the continuation of the Black Sea Grain Initiative and an expected reduction in the national area planted with 2023 winter wheat crops. In **Belarus**, following the partial removal of price controls that were introduced in early 2021, the national average retail price of wheat flour increased steeply between April and June 2022, but levelled off thereafter and remained stable until September (latest available data), at higher year-on-year levels. In **the Republic of Moldova**, wheat flour prices were generally stable in recent months, between August and September, but were about 30 percent higher on a yearly basis, reflecting high transportation, packaging and other transaction costs.

About 17.7 million people in need of humanitarian assistance and protection in Ukraine

According to the latest Update of the Ukraine Flash Appeal issued by the United Nations in August 2022, about 17.7 million people are estimated to be in urgent need of humanitarian assistance and protection between March and December 2022. This shows an increase of about 2 million people compared to the number estimated in April and is mainly caused by the intensification of fighting and hostilities across the frontline since May. About 6.5 million people were estimated to be displaced in the country as of late October (International Organization for Migration [IOM]), while 7.8 million Ukrainian refugees had been recorded in European countries as of 8 November 2022 (United Nations High Commissioner for Refugees [UNHCR]).

OCEANIA

Large wheat crop foreseen in Australia in 2022

In **Australia**, harvesting of the 2022 wheat crop is underway and production is pegged at 32.2 million tonnes, the second largest output on record, supported by prospects of well above-average yields. Outputs of barley and sorghum are also anticipated to remain above previous five-year averages, spurred by expectations of above-average area and yields.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2017/18–2021/22	2018/19	2019/20	2020/21	2021/22	2022/23
Ratio of world stocks to utilization (%)						
Wheat	*37.6*	*36.6*	*37.2*	*37.7*	*37.9*	*38.0*
Coarse grains	*24.9*	*25.4*	*23.9*	*23.3*	*24.7*	*22.4*
Rice	*36.9*	*37.2*	*36.7*	*37.1*	*38.0*	*37.0*
Total cereals	***30.6***	***30.7***	***30.0***	***29.9***	***30.9***	***29.4***
Ratio of major cereal exporters' supplies to market requirements (%)[I]	*117.6*	*116.6*	*118.5*	*115.5*	*114.8*	*112.8*
Ratio of major exporters' stocks to their total disappearance (%)[II]						
Wheat	*17.1*	*18.1*	*15.5*	*15.2*	*15.7*	*17.3*
Coarse grains	*14.1*	*15.6*	*14.2*	*11.8*	*13.5*	*12.4*
Rice	*24.9*	*22.6*	*26.1*	*28.5*	*29.4*	*29.8*
Total cereals	***18.7***	***18.8***	***18.6***	***18.5***	***19.5***	***19.8***
	Average growth rate 2012–2021	**2018**	**2019**	**2020**	**2021**	**2022**
Annual growth in world cereal production (%)	*2.2*	*-1.8*	*2.6*	*2.3*	*1.3*	*-2.0*
Annual growth in cereal production in the LIFDCs (%)	*1.7*	*4.9*	*2.7*	*3.0*	*-5.0*	*-0.2*
		2019	**2020**	**2021**	**2022***	**Change 2022* over 2021***
Selected cereal price indices[III]						
Wheat		*95.3*	*100.7*	*132.1*	*166.4*	*27.9%*
Maize		*94.6*	*100.8*	*144.8*	*170.2*	*17.9%*
Rice		*101.5*	*110.2*	*105.8*	*107.9*	*1.3%*

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–November average.

Table A2. World cereal stocks

(million tonnes)

	2018	2019	2020	2021	2022 estimate	2023 forecast
TOTAL CEREALS	***856.1***	***831.7***	***827.7***	***837.9***	***857.9***	***839.4***
Wheat	***289.1***	***274.0***	***284.0***	***292.0***	***293.0***	***300.1***
held by:						
- main exporters[I]	*84.5*	*71.2*	*63.2*	*60.1*	*61.4*	*67.6*
- others	*204.6*	*202.8*	*220.8*	*231.9*	*231.6*	*232.5*
Coarse grains	***389.9***	***371.2***	***356.5***	***352.1***	***367.8***	***345.4***
held by:						
- main exporters[I]	*127.3*	*128.2*	*122.1*	*102.9*	*117.0*	*105.8*
- others	*262.6*	*243.0*	*234.4*	*249.2*	*250.8*	*239.6*
Rice (milled basis)	***177.1***	***186.5***	***187.3***	***193.8***	***197.1***	***194.0***
held by:						
- main exporters[I]	*32.2*	*39.6*	*45.8*	*52.4*	*57.3*	*56.9*
- others	*144.9*	*146.9*	*141.5*	*141.4*	*139.8*	*137.1*
Developed countries						
Australia	*7.3*	*6.9*	*5.7*	*7.3*	*8.4*	*8.1*
Canada	*11.1*	*9.4*	*9.5*	*9.7*	*7.4*	*10.1*
European Union[II]	*41.3*	*41.0*	*41.6*	*35.9*	*42.8*	*36.7*
Japan	*6.7*	*6.5*	*6.9*	*7.5*	*6.9*	*7.1*
Russian Federation	*23.7*	*15.3*	*13.6*	*17.5*	*18.1*	*30.4*
South Africa	*5.1*	*3.6*	*2.6*	*3.9*	*4.6*	*4.9*
Ukraine	*8.3*	*7.7*	*5.6*	*5.9*	*23.2*	*15.2*
United States of America	*88.8*	*91.3*	*80.7*	*58.4*	*57.2*	*49.2*
Developing countries						
Asia						
China (mainland)	*401.0*	*385.6*	*382.7*	*392.7*	*399.0*	*402.3*
India	*44.0*	*52.0*	*64.3*	*68.9*	*67.5*	*62.1*
Indonesia	*10.2*	*11.5*	*9.1*	*7.6*	*8.2*	*8.4*
Iran (Islamic Republic of)	*10.6*	*9.2*	*10.0*	*11.7*	*12.7*	*12.5*
Korea, Republic of	*4.1*	*2.6*	*2.6*	*3.0*	*3.2*	*3.5*
Pakistan	*5.4*	*3.3*	*2.0*	*4.4*	*6.5*	*5.6*
Philippines	*4.1*	*5.5*	*4.5*	*4.6*	*4.8*	*4.8*
Syrian Arab Republic	*2.1*	*2.2*	*3.2*	*4.1*	*2.5*	*0.9*
Türkiye	*7.1*	*6.6*	*10.1*	*10.5*	*9.2*	*10.2*
Africa						
Algeria	*5.3*	*6.6*	*6.7*	*6.3*	*5.4*	*5.8*
Egypt	*6.9*	*5.1*	*5.3*	*4.6*	*3.3*	*3.9*
Ethiopia	*5.5*	*6.2*	*7.1*	*7.3*	*6.9*	*5.7*
Morocco	*6.7*	*7.3*	*5.8*	*3.6*	*5.7*	*4.6*
Nigeria	*3.1*	*2.9*	*1.5*	*1.8*	*1.4*	*1.3*
Tunisia	*1.1*	*1.0*	*1.2*	*1.0*	*1.0*	*1.1*
Central America and the Caribbean						
Mexico	*7.7*	*7.6*	*7.4*	*6.9*	*6.8*	*5.3*
South America						
Argentina	*12.3*	*12.6*	*12.7*	*11.0*	*8.1*	*8.6*
Brazil	*20.2*	*16.9*	*16.7*	*17.5*	*13.8*	*15.3*

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)						
2008/09	270	201	234	188	180	184
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	426	362	390	309	291	345
Monthly						
2020 - October	273	245	257	187	217	275
2020 - November	275	250	259	193	226	284
2020 - December	267	249	269	199	232	292
2021 - January	291	280	282	233	257	324
2021 - February	291	278	272	246	248	341
2021 - March	274	274	267	246	236	343
2021 - April	281	278	267	266	253	367
2021 - May	298	294	280	304	272	398
2021 - June	285	263	274	295	251	389
2021 - July	291	251	276	279	235	355
2021 - August	324	272	285	254	237	327
2021 - September	337	270	291	235	240	296
2021 - October	353	302	302	238	246	298
2021 - November	378	330	314	249	252	306
2021 - December	379	329	318	266	260	317
2022 - January	374	324	304	277	272	324
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

[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 2021/2022 or 2022

(thousand tonnes)

		2020/21 or 2021	2021/22 or 2022
	Marketing year	Total imports	Total imports
AFRICA		***31 879.7***	***33 051.0***
East Africa		***12 401.5***	***14 190.1***
Burundi	Jan/Dec	*184.0*	*178.0*
Comoros	Jan/Dec	*67.6*	*67.0*
Eritrea	Jan/Dec	*459.0*	*459.7*
Ethiopia	Jan/Dec	*2 015.0*	*1 950.0*
Kenya	Oct/Sept	*3 639.0*	*4 368.6*
Rwanda	Jan/Dec	*296.8*	*269.8*
Somalia	Aug/Jul	*1 015.0*	*1 060.0*
South Sudan	Nov/Oct	*715.0*	*720.0*
Sudan	Nov/Oct	*2 378.0*	*3 599.0*
Uganda	Jan/Dec	*667.1*	*603.0*
United Republic of Tanzania	Jun/May	*965.0*	*915.0*
Southern Africa		***3 702.0***	***3 046.9***
Lesotho	Apr/Mar	*179.8*	*159.6*
Madagascar	Apr/Mar	*737.4*	*915.5*
Malawi	Apr/Mar	*136.3*	*157.5*
Mozambique	Apr/Mar	*1 804.3*	*1 482.9*
Zimbabwe	Apr/Mar	*844.2*	*331.4*
West Africa		***13 112.3***	***13 133.8***
Coastal Countries		***7 605.2***	***7 297.0***
Benin	Jan/Dec	*522.7*	*682.0*
Côte d'Ivoire	Jan/Dec	*2 377.1*	*2 512.3*
Ghana	Jan/Dec	*1 970.3*	*1 492.7*
Guinea	Jan/Dec	*1 326.1*	*1 210.5*
Liberia	Jan/Dec	*417.1*	*371.0*
Sierra Leone	Jan/Dec	*518.2*	*603.0*
Togo	Jan/Dec	*473.7*	*425.5*
Sahelian Countries		***5 507.1***	***5 836.8***
Burkina Faso	Nov/Oct	*516.5*	*562.9*
Chad	Nov/Oct	*192.6*	*202.6*
Gambia	Nov/Oct	*236.9*	*322.0*
Guinea-Bissau	Nov/Oct	*161.7*	*132.3*
Mali	Nov/Oct	*593.4*	*706.0*
Mauritania	Nov/Oct	*538.8*	*402.0*
Niger	Nov/Oct	*631.6*	*618.0*
Senegal	Nov/Oct	*2 635.6*	*2 891.0*
Central Africa		***2 663.9***	***2 680.2***
Cameroon	Jan/Dec	*1 481.0*	*1 462.0*
Congo	Jan/Dec	*345.5*	*260.7*
Central African Republic	Jan/Dec	*96.0*	*97.0*
Democratic Republic of the Congo	Jan/Dec	*719.0*	*838.5*
Sao Tome and Principe	Jan/Dec	*22.4*	*22.0*

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 1 945 in 2019); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of low-income food-deficit countries in 2021/2022 or 2022

(thousand tonnes)

		2020/21 or 2021	2021/22 or 2022
	Marketing year	Total imports	Total imports
ASIA		***28 833.2***	***28 858.9***
Cis in Asia		***5 717.7***	***5 393.1***
Kyrgyzstan	Jul/Jun	*633.6*	*794.9*
Tajikistan	Jul/Jun	*1 129.8*	*1 081.0*
Uzbekistan	Jul/Jun	*3 954.3*	*3 517.2*
Far East		***12 651.5***	***12 269.8***
Bangladesh	Jul/Jun	*10 533.7*	*10 449.0*
Democratic People's Republic of Korea	Nov/Oct	_*	_*
Nepal	Jul/Jun	*2 117.8*	*1 820.8*
Near East		***10 464.0***	***11 196.0***
Afghanistan	Jul/Jun	*2 754.0*	*3 774.0*
Syrian Arab Republic	Jul/Jun	*2 470.0*	*2 782.0*
Yemen	Jan/Dec	*5 240.0*	*4 640.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 466.4***	***1 541.7***
Haiti	Jul/Jun	*678.1*	*661.7*
Nicaragua	Jul/Jun	*788.3*	*880.0*
TOTAL		***62 179.3***	***63 451.6***

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 1 945 in 2019); for full details see http://www.fao.org/countryprofiles/lifdc

* Estimates not available.

Table A5. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023

(thousand tonnes)

		2021/22	2022/23
	Marketing year	Total imports	Total import requirements
AFRICA		***5 021.9***	***5 410.2***
East Africa		***1 975.0***	***2 165.0***
Somalia	Aug/Jul	*1 060.0*	*1 140.0*
United Republic of Tanzania	Jun/May	*915.0*	*1 025.0*
Southern Africa		***3 046.9***	***3 245.2***
Lesotho	Apr/Mar	*159.6*	*251.6*
Madagascar	Apr/Mar	*915.5*	*821.0*
Malawi	Apr/Mar	*157.5*	*158.5*
Mozambique	Apr/Mar	*1 482.9*	*1 581.0*
Zimbabwe	Apr/Mar	*331.4*	*433.1*
ASIA		***24 218.9***	***24 388.4***
CIS in Asia		***5 393.1***	***5 311.6***
Kyrgyzstan	Jul/Jun	*794.9*	*667.6*
Tajikistan	Jul/Jun	*1 081.0*	*1 152.0*
Uzbekistan	Jul/Jun	*3 517.2*	*3 492.0*
Far East		***12 269.8***	***12 827.8***
Bangladesh	Jul/Jun	*10 449.0*	*10 657.0*
Nepal	Jul/Jun	*1 820.8*	*2 170.8*
Near East		***6 556.0***	***6 249.0***
Afghanistan	Jul/Jun	*3 774.0*	*3 504.0*
Syrian Arab Republic	Jul/Jun	*2 782.0*	*2 745.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 541.7***	***1 569.0***
Haiti	Jul/Jun	*661.7*	*699.0*
Nicaragua	Jul/Jun	*880.0*	*870.0*
TOTAL		***30 782.5***	***31 367.6***

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

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