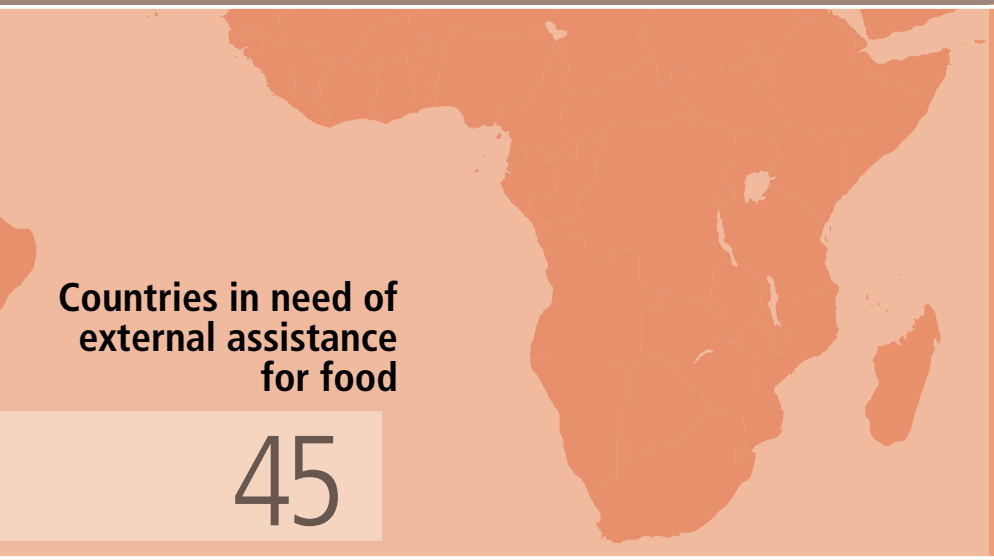
Food and Agriculture Organization of the United Nations

No. 2
JULY 2023

ISSN 2707-2223

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. Although drought conditions eased in East Africa, production prospects remain unfavourable in 2023, while conflicts in several parts of the African continent are aggravating food security concerns. At the global level, El Niño poses a risk to agricultural production and food security in several regions, particularly Southern Africa and Central America.

Asia	+1.1
Africa	-0.7
Central America and the Caribbean	+0.1
South America	-0.6
North America	+9.4
Europe	-1.3
Oceania	-30.7
World	**+1.1**

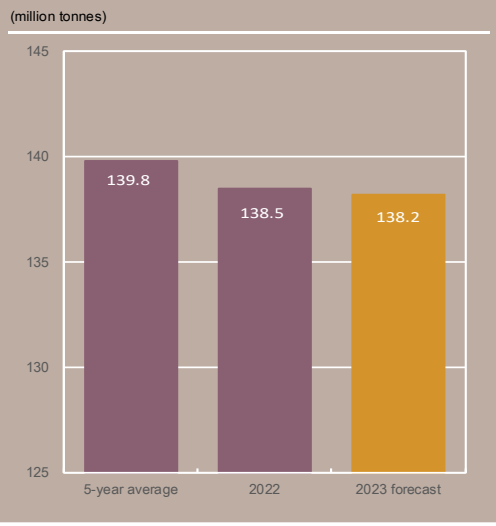
Global cereal production 2023 over 2022

(yearly percentage change)

+1.1

LIFDC cereal production 2023 over 2022

-0.2



REGIONAL HIGHLIGHTS

AFRICA Substantial rainfall deficits curbed 2023 wheat harvests in North Africa, whilst aggregate cereal production in Southern Africa, despite the impact of cyclones and dryness, is pegged at an above-average level. Erratic rains are impairing 2023 production prospects in East Africa, following two successive years of widespread drought that had a devastating impact on food security, which is further weakened by conflicts, notably in the Sudan. In West Africa, beneficial weather conditions are underpinning an overall favourable production outlook in 2023, but conflicts still impinge on local agricultural productive capacity.

ASIA In Far East Asia, aggregate wheat production reached a record high in 2023 and prospects are generally favourable for the other 2023 main season cereal crops. In Myanmar, civil insecurity is causing shortages and high prices of agricultural inputs, potentially curtailing production. Following early season dryness in Near East Asia, increased rainfall amounts since March improved crop conditions and 2023 cereal production is forecast at an above-average level.

LATIN AMERICA AND THE CARIBBEAN
In South America, prolonged drought conditions have cut production in Argentina, where the 2023 maize harvest is forecast well below the average. By contrast, robust demand has driven up plantings in Brazil and, combined with good weather conditions, maize production is foreseen to reach an all-time record in 2023. In Central America and the Caribbean, poor rains in 2023 are undermining cereal production prospects in Haiti, where acute food insecurity worsened due to civil insecurity, violence and the country's economic downturn.

Required citation:

FAO. 2023. *Crop Prospects and Food Situation* – Quarterly Global Report No. 2, July 2023. Rome. https://doi.org/10.4060/cc6806en

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

ISBN 978-92-5-137991-2

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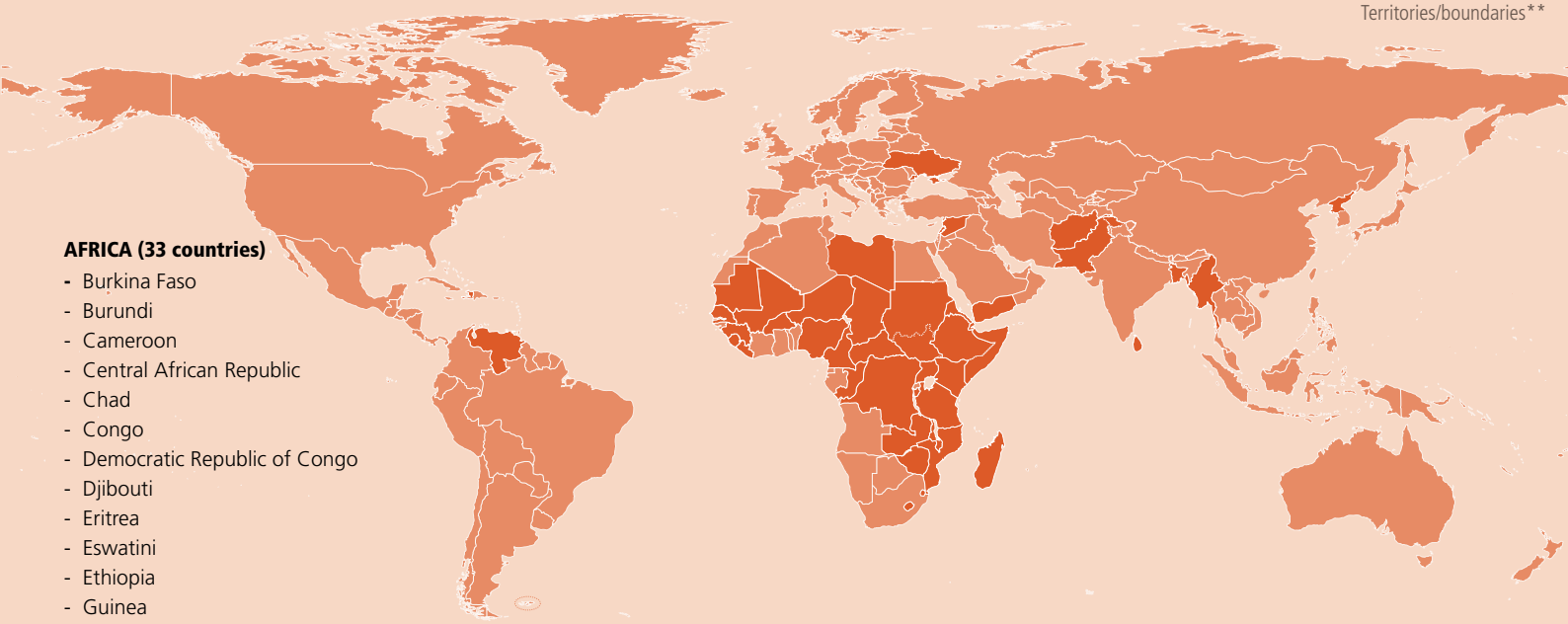
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of June 2023
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: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 2.* Cited 7 July 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

AFRICA (33 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, high food prices, weather extremes

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3 [Crisis] and above) was projected to reach 2.4 million between April and August 2023, including about 622 000 people in IPC Phase 4 (Emergency). The situation reflects the impact of the conflict and civil insecurity, as well as the effects of flooding and drought conditions that curbed crop yields and agricultural production.
- As of February 2023, 483 000 people were internally displaced as a result of armed violence.

Kenya

Weather extremes

- According to the latest estimates, about 5.4 million people were acutely food insecure between March and June 2023, reflecting the lingering impact of a prolonged and severe drought between late 2020 and early 2023 that affected crop and livestock production, mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

Somalia

Drought conditions, civil insecurity

- About 6.6 million people were estimated to face severe acute food insecurity between April and June 2023, including about 40 000 people in IPC Phase 5 (Catastrophe) as a result of consecutive poor rainy seasons since late 2020 and heightened conflict since early 2021.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes, high food prices

- According to the latest estimates, about 1.2 million people are estimated to be facing IPC Phase 3 (Crisis) levels of acute food insecurity between June and September 2023, unchanged year-on-year but notably with no populations in IPC Phase 4 (Emergency), unlike 2022. The main drivers are the lingering impact of floods in northern areas in late 2022 and high food prices due, in part, to the depreciation of the national currency.

Chad

Civil insecurity, high food prices

- According to the latest Cadre Harmonisé (CH) analysis, about 1.86 million people are projected to experience acute food insecurity during the June to August 2023 lean season period,

including nearly 107 000 people in CH Phase 4 (Emergency). This would be an improvement compared to the previous year, mostly due to the higher year-on-year cereal output in 2022 after the below-average 2021 production.

- Acute food insecurity is underpinned by persisting insecurity in Lac and Tibesti regions, which had displaced over 380 000 people by April 2023. Furthermore, elevated food prices due to high fuel costs and localized crop losses during the 2022 floods are aggravating food insecurity.
- As of mid-June 2023, over 715 000 refugees were residing in the country. In particular, the ongoing conflict in the Sudan led about 90 000 people to flee to the country since mid-April 2023, a number that is expected to increase further.

Democratic Republic of the Congo

Civil insecurity in eastern areas, high food prices

- According to the October 2022 IPC analysis, 25.8 million people were projected to experience acute food insecurity between January and June 2023. This is due to the intensification of the conflict in northeastern provinces, which, among other factors, has prevented the completion of the harvests and will likely reduce food availability in the months to come.
- As of early 2023, 2.35 million people in North Kivu and 1.6 million people in Ituri had been displaced due to the conflict.

Djibouti

Unfavourable weather, high food prices

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

Eritrea

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

Ethiopia

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

- According to the 2023 Humanitarian Response Plan, about 20.1 million people are officially estimated to be facing severe acute food insecurity, mainly due to the lingering impact of drought conditions in southern areas between late 2020 and early 2023, the conflict in Tigray Region between late 2020 and late 2022, and high food prices.

Malawi

Weather extremes, high food prices

- An estimated 3.82 million people faced acute food insecurity (IPC Phase 3 [Crisis]) between October 2022 and March 2023, more than double the estimate for the January to March 2022 period.
- The impact of Cyclone Freddy in southern districts, including crop losses and destruction of infrastructure as well as high food prices, are expected to aggravate food insecurity conditions in 2023.

Mauritania

High food prices

- According to the latest CH analysis, over 472 000 people are projected to be in need of humanitarian assistance during the June to August 2023 lean season, including about 28 000 people in CH Phase 4 (Emergency). This would be an improvement compared to the previous year, mostly due to a substantial increase in cereal production in 2022.
- High food prices, in particular of imported wheat, continue to worsen acute food security.
- As of November 2022 (latest available data), the country was hosting over 100 000 refugees, mostly from Mali.

Niger

Conflict, high food prices, floods

- About 3.28 million people are projected to be acutely food insecure during the June to August 2023 lean season period, including over 150 000 people in CH Phase 4 (Emergency). This would be an improvement on the situation in 2022, mostly reflecting the sharp upturn in crop yields following the below-average cereal output in 2021.
- Persisting insecurity continues to disrupt livelihoods and has displaced over 360 000 people, mostly in Diffa, Tahoua and Tillabery regions, as of May 2023. High food prices, as well as floods in 2022 that affected about 327 000 people, are additional factors that have aggravated food insecurity.
- As of May 2023, the country was hosting nearly 300 000 refugees, mainly from Nigeria and Mali.

Nigeria

Conflict in northern areas, high food prices, macroeconomic challenges,

- About 24.86 million people are projected to face acute food insecurity during the June to August 2023 lean season, including about 1.14 million people in CH Phase 4 (Emergency), which is above the 19.45 million people estimated to be acutely food insecure in 2022. The increase, however, mainly reflects an expanded geographical coverage of the CH analysis.
- Acute food insecurity is mostly the result of worsening insecurity and conflicts in northern states, which, as well as impeding farmers' physical access to their lands and disrupting agricultural activities, led to the displacement of about 3.57 million people as of April 2023.
- Macroeconomic challenges, marked by persistent high inflation, depreciation of the naira on the parallel market, high fuel prices and the lingering impacts of cash shortages following the introduction of new banknotes at the start of 2023, have aggravated the food security conditions of vulnerable households.
- As of May 2023, nearly 92 000 refugees, mostly from Cameroon, were residing in the country.

South Sudan

Economic downturn, floods, civil insecurity

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, owing to rampant inflation and insufficient food supplies, due to a stagnant agricultural production, impact of consecutive years with widespread floods and the escalation of organized violence at the subnational level since 2020. About 7.76 million people, almost two-thirds of the total population, are expected to face severe acute food insecurity in the lean season between April and July 2023.
- Particular concern exists for households in Akobo, Canal/Pigi and Fangak counties of Jonglei State and for Leer and Mayendit

counties of Unity State, where about 43 000 individuals are expected to face IPC Phase 5 (Catastrophe).

Zimbabwe

High food prices

- Based on a government assessment, an estimated 3.8 million people were 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 security 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.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north, high food prices

- According to the latest CH analysis, about 3.35 million people are projected to face acute food insecurity during the June to August 2023 lean season period, including over 604 500 people in CH Phase 4 (Emergency) and nearly 42 700 in CH Phase 5 (Catastrophe). At the aggregate level, this would be a slight decrease compared to 2022, when 3.45 million people were estimated to be in need of humanitarian assistance. However, it marks the highest figure of people in catastrophic conditions.
- Acute food insecurity is primarily underpinned by poor insecurity in northern and eastern areas, and in particular by the use of siege tactics by non-state armed groups in the country's Sahel Region. As of March 2023, civil insecurity resulted in the displacement of about 2.06 million people.
- Persistent high food prices are affecting vulnerable households across the country, particularly those in conflict-affected areas due to market disruptions as well as constrained access to sources of income and humanitarian assistance.
- As of April 2023, over 36 000 refugees, mostly from Mali, were residing in the country.

Cameroon

Civil insecurity, high food prices

- According to the March 2023 CH analysis, about 2.4 million people are estimated to be acutely food insecure (CH Phase 3 [Crisis] and above), between March and August 2023, as a result of conflict, sociopolitical unrest and high food prices, as well as floods that caused population displacements and damaged standing crops.
- As of June 2023, the number of internally displaced people (IDPs) is more than 2 300, due to attacks by a non-state armed groups in the Far North region.

Congo

Refugee influx, floods

- As of end-2022, nearly 30 000 refugees from the Central African Republic and approximately 26 000 from the Democratic Republic of the Congo were residing in the country, mostly in Likouala and Plateaux departments. Host communities face pre-existing food shortages and limited livelihood opportunities, and refugees' food security relies heavily on ongoing humanitarian assistance.
- Above-average rainfall amounts since November 2022 triggered flooding in December and January in central and northern parts of the country, displacing people. According to damage assessment reports, about 165 000 people have been affected in 23 districts in the departments of Cuvette, Likouala, Plateaux and Sangha.

Eswatini

High food prices, economic downturn

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

Guinea

High food prices

- Nearly 710 000 people are projected to be acutely food insecure during the June to August 2023 lean season, including over 12 000 people in CH Phase 4 (Emergency), an improvement compared to 2022 when about 1.22 million people were estimated to face acute food insecurity.
- Acute food insecurity is mainly driven by high food prices. As of May 2023, an estimated 2 200 refugees, mostly from Sierra Leone, were residing in the country.

Lesotho

High food prices, economic downturn

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

Liberia

High food prices, macroeconomic challenges

- Over 531 000 people are projected to be acutely food insecure during the June to August 2023 lean season period, including approximately 21 500 people in CH Phase 4 (Emergency).
- Acute food insecurity is associated with high food prices due to high international commodity prices and elevated transport costs.
- As of May 2023, the country was hosting about 1 800 refugees.

Libya

Civil insecurity, economic and political instability, high food prices

- The 2023 Humanitarian Needs Overview states that about 300 000 people (less than 4 percent of the population) are estimated to be in need of humanitarian assistance in 2023.

Madagascar

Weather extremes, slow economic recovery

- Between January and March 2023, an estimated 2.2 million people were 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.
- The passage of Cyclone Freddy in February 2023 caused disruptions to livelihoods and resulted in crop damage, which further aggravated food insecurity.

Mali

Civil insecurity, high food prices

- According to the latest CH analysis, about 1.26 million people are projected to face acute food insecurity during the June to

August 2023 lean season period. This figure includes nearly 76 250 people in CH Phase 4 (Emergency) and over 2 500 in CH Phase 5 (Catastrophe), the first time that a segment of the population has been assessed to face CH Phase 5 (Catastrophe) levels of food insecurity. In total, however, the number of food insecure is lower in 2023 compared to 2022.

- Food insecurity conditions are primarily underpinned by the impact of the conflict in central and northern areas, which has caused the displacement of over 375 000 people, as of April 2023.
- Persistent high food prices affect vulnerable households across the country, but limit, in particular, the food access of people in conflict-affected areas due to market disruptions and limited access to sources of income and humanitarian assistance.
- As of May 2023, the country was hosting approximately 64 000 refugees, mostly from Burkina Faso, the Niger and Mauritania.

Mozambique

Insecurity in northern areas, weather extremes

- Extreme weather events in 2022 affected a large number of people, while insecurity in the northern province of Cabo Delgado continues to impact livelihoods and underpins the severest levels of acute food insecurity. Food insecurity estimates for 2023 are not yet available, but between April and September 2022 a projected 1.4 million people were facing acute food insecurity (IPC Phase 3 [Crisis] and above).
- The landing of Cyclone Freddy in February 2023 is expected to have caused disruptions to livelihoods and resulted in crop damage, aggravating food insecurity of the affected population.

Namibia

Localized shortfalls in cereal production, high food prices

- An estimated 390 000 people faced acute food insecurity (IPC Phase 3 [Crisis] and above) in the January to March 2023 period, lower than the figure in the corresponding period of 2022. High food prices and localized weather-induced shortfalls in cereal production in 2022 were the key drivers.

Senegal

High food prices, macroeconomic challenges

- The latest CH analysis indicates that about 1.26 million people are projected to be acutely food insecure during the June to August 2023 lean season, including over 57 000people in CH Phase 4 (Emergency). This would be a significant deterioration compared to the previous year, when about 881 000 people were estimated to be in need of humanitarian assistance.
- The main drivers of acute food insecurity are macroeconomic challenges and high prices of basic food items.
- As of January 2023, an estimated 12 000 refugees, mostly from Mauritania, required humanitarian assistance.

Sierra Leone

High food prices, macroeconomic challenges

- According to the latest CH analysis, about 1.18 million people are projected to be in need of humanitarian assistance between the June to August 2023 lean season, including nearly 34 500 people in CH Phase 4 (Emergency).
- Acute food insecurity is underpinned by elevated food prices, in part driven by a weak national currency, and low purchasing power of vulnerable households.

Sudan

Conflict, displacements, high food prices

- About 19.9 million people are currently expected to require emergency food and livelihood assistance, due to the conflict that broke out in mid-April 2023 which severely damaged livelihoods, paralyzed economic activities, triggered a surge in the already high food prices and caused large-scale displacements, with about 1.67 million people displaced inside of the country and about 528 000 people having fled to neighbouring countries.

Uganda

Weather extremes, insecurity, high food prices

- The latest IPC analysis, conducted in the northeastern agropastoral Karamoja Region, estimates that about 582 000 people are facing acute food insecurity (IPC Phase 3 [Crisis] and above) between April and August 2023. These conditions reflect the adverse impact of weather shocks, crop and livestock diseases, civil insecurity and high food prices.
- About 882 000 refugees from South Sudan and about 495 000 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, an estimated 990 000 people were facing severe acute food insecurity between March and May 2023, 839 000 people in 28 mainland districts and 151 000 in Zanzibar Island.
- The main drivers are reduced domestic crop production and high food prices.

Zambia

Reduced cereal production, high food prices

- An estimated 1.95 million people were projected to face 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 adversely impacted households' food availability and access.

ASIA (9 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict, economic crisis

- Based on the World Food Programme's (WFP) Consolidated Approach for Reporting Indicators (CARI), about 12.1 million people were assessed to be acutely food insecure (55 percent of the total population) between August and October 2022, mostly due to constrained livelihood opportunities and continuously 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

- The food security situation is expected to remain fragile, given persisting economic constraints aggravated by a below-average 2022 agricultural output.

Lebanon

Economic crisis

- According to the IPC Acute Food Insecurity Analysis, about 1.29 million Lebanese residents (33 percent of the resident population) and 0.7 million Syrian refugees (46 percent of the total number of Syrian refugees in the country) were estimated to be in IPC Phase 3 (Crisis) or above between September and December 2022. This number increased to 1.46 million Lebanese resident (38 percent of the resident population) and 0.80 million Syrian refugees (53 percent of the total number of Syrian refugees in Lebanon) between January and April 2023.

Sri Lanka

Unfavourable prospects for 2023 agricultural output, high prices of key food items

- The 2023 cereal production is forecast below the five-year average, mostly reflecting constraints on farmers' access to agricultural inputs. Elevated prices of key food items are also constraining economic access to food for a large number of households.
- Most households in the country are food secure, but pockets of food insecurity persist in some areas.

Yemen

Conflict, floods, high food and fuel prices

- Nearly 17 million people or over 53 percent of the population were classified in IPC Phase 3 (Crisis) 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 15.3 million (35 percent of the population analysed) between May and October 2023.

Bangladesh

Economic constraints, refugee influx, high prices of staple foods

- Food insecurity is expected to remain fragile, given persisting economic constraints.
- About 1 million Rohingya refugees from Myanmar reside in the country, mainly in Cox's Bazar District and on the island of Bhasan Char.
- Domestic prices of wheat flour and palm oil, important food items, were at high levels in May 2023.

Myanmar

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

- The protracted political crisis is compromising the fragile conditions of vulnerable households and the Rohingya IDPs. According to the latest figures (May 2023) from the United Nations High Commissioner for Refugees (UNHCR), the number of IDPs is estimated at about 1.83 million. Most of the IDPs are located in Rakhine, Chin, Kachin, Kayin and Shan states.
- Domestic prices of "Emata" rice, the most consumed variety in the country, were at record levels as of May 2023, constraining access to a key staple food.

Pakistan

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

- According to the latest IPC analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between April and October 2023 is estimated at 10.5 million, due to the devastating flood impacts in 2022. This number is larger than the projection made in 2022, mainly reflecting an expanded geographical coverage of the IPC analysis.
- Prices of wheat flour, the country's main staple, were at elevated levels in most markets in January 2023, constraining access to a key staple food.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Haiti

High food prices, natural disasters, civil insecurity

- About 4.9 million people are estimated to face severe acute food insecurity and were in need of urgent food assistance between March and June 2023. The high levels of food insecurity are the result of a sustained economic downturn, reducing domestic food production, elevated food prices, fuel shortage and frequent natural disasters. The situation is exacerbated by worsening insecurity, which has limited access to essential services, including markets, caused population displacements and hampered delivery of humanitarian assistance.

Venezuela (Bolivarian Republic of)

Economic crisis

- The total number of refugees and migrants from the country is estimated at 7.3 million, with the largest populations located in Colombia (2.48 million), Peru (1.52 million), Ecuador (502 200), Brazil (449 700) and Chile (444 400). 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. Despite a resumption of economic growth since 2021, outflows of refugees and migrants have continued in the first five months of 2023. High food inflation rates across host countries as well as limited income-earning opportunities are limiting access to food of Venezuelan refugees and migrants, and thus humanitarian needs are significant. According to the Regional Refugee and Migrant Response Plan 2023–2024, the number of Venezuelan refugees and migrants (in-destination) in need of food assistance is projected at 3.62 million in 2023, slightly up from 3.57 million in 2022.

NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

WIDESPREAD LACK OF ACCESS

Ukraine

Conflict

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

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):

Africa (page 12)
Latin American and the Caribbean (page 29)

** 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 forecast lifted and now reaching a record high

FAO's new forecast for global cereal **production** in 2023 has been raised by 5.9 million tonnes (0.2 percent) in July compared to the previous month, now standing at 2 819 million tonnes, 1.1 percent higher year-on-year and reaching a record high.[1] This month's increase almost entirely reflects better prospects for global wheat production, with the forecast lifted by 0.9 percent to 783.3 million tonnes, albeit still remaining 18.4 million below the record registered in 2022. Upward revisions have been made to the forecast for wheat production in the European Union, where generally conducive weather conditions instigated a small upturn in yield expectations, notwithstanding the effects of rainfall deficits in the Iberian Peninsula. Forecasts have also been raised marginally for Canada and Kazakhstan, where spring wheat is predominantly grown, on account of higher-than-previously anticipated plantings, while recently released official estimates place Türkiye's wheat crop higher than the preliminary forecast. These increases more than offset a sizeable cut to Australia's production forecast, as expectations of drier-than-normal weather conditions have undermined yield prospects. The forecast for global production of coarse grains in 2023 was lowered fractionally in July relative to the previous month's figure but, pegged at 1 512 million tonnes, is still 2.9 percent higher than in 2022. The downgrade includes downward revisions to maize production forecasts for East African countries, owing to uneven rainfall distribution that curtailed yield potentials. These reductions more than outweigh an increase in the global production forecast for barley, largely reflecting official estimates from Türkiye that point to a larger-than-initially expected harvest. Improved yield expectations for Bangladesh and a few small adjustments to production figures for countries located along and south of the equator, where main crop harvests have now concluded, have slightly raised FAO's forecast for world rice production in 2023/24 to 523.7 million tonnes (milled basis), up from a revised 2022/23 global harvest figure of 517.6 million tonnes.

The forecast for world cereal **utilization** in 2023/24 has been lifted marginally (by 1.5 million tonnes, or 0.1 percent) in July compared to the previous month and is now set to reach 2 805 million tonnes, 0.9 percent higher than in 2022/23. An upward revision of 2.3 million tonnes to wheat utilization, driven mostly by higher-than-earlier-anticipated feed use, has lifted the total wheat utilization forecast for 2023/24 to 783 million tonnes, 0.3 percent higher than in 2022/23. Pegged at 1 503 million tonnes, FAO's forecast for total coarse grain utilization in 2023/24 is nearly unchanged since June and still points to an expansion of 1.6 percent from the 2022/23 level, with an anticipated increase in maize utilization, especially for feed, accounting for the bulk of the growth. World rice utilization in 2023/24 remains forecast at 520.0 million tonnes, essentially unchanged from the 2022/23 level, as an anticipated population-led expansion in food use will likely be largely offset by a reduction in the use of rice for animal feed.

FAO's new forecast for world cereal **stocks** by the close of 2023/24 seasons stands at 878 million tonnes, up 5.1 million tonnes

Table 1. World cereal production
(million tonnes)

	2021	2022 est.	2023 f'cast	Change: 2023 over 2022 (%)
Asia	1 240.6	1 250.6	1 264.7	+1.1
Far East	1 150.3	1 145.6	1 157.9	+1.1
Near East	59.5	68.5	70.4	+2.8
CIS in Asia	30.8	36.4	36.3	-0.3
Africa	202.4	199.0	197.7	-0.7
North Africa	35.9	31.3	31.4	+0.3
West Africa	63.4	68.6	67.3	-1.9
Central Africa	7.1	6.9	7.0	+0.4
East Africa	54.9	55.0	52.8	-4.0
Southern Africa	41.1	37.2	39.2	+5.4
Central America and the Caribbean	42.9	42.5	42.6	+0.1
South America	227.8	246.0	244.4	-0.6
North America	496.6	473.3	517.7	+9.4
Europe	548.8	517.0	510.1	-1.3
European Union[1]	296.9	269.0	288.9	+7.4
CIS in Europe	214.4	210.5	183.5	-12.8
Oceania	55.9	60.3	41.8	-30.7
World	2 815.0	2 788.7	2 819.0	+1.1
- wheat	778.3	801.8	783.3	-2.3
- coarse grains	1 510.8	1 469.4	1 512.0	+2.9
- rice (milled)	526.0	517.6	523.7	+1.2

Notes: Includes rice in milled terms. 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.

(0.6 percent) compared to the figure in June and 2.3 percent from the previous season. At this level, the global cereal stocks-to-use ratio in 2023/24 would remain unchanged year-on-year at 30.6 percent, continuing to indicate comfortable supply prospects in the new season. Global wheat inventories are now seen rising slightly above their opening levels (by 0.9 percent) in 2023/24 and reaching 314 million tonnes, as a result of a 5.5-million-tonne upward adjustment this month largely following revisions made for China (mainland), the European Union and Kazakhstan. The forecast for global coarse grain inventories has been trimmed fractionally this month, mainly resting on downward revisions to maize stocks in Brazil and Ukraine, but still points to a 3.7-percent year-on-year rise to 366 million tonnes in 2023/24, bolstered by a sharp anticipated rebound in maize stocks in the United States of America. World rice stocks at the close of 2023/24 seasons are pegged at an all-time high of 198.5 million tonnes. This forecast is up slightly from June, mainly mirroring expectations of a less pronounced drawdown in Myanmar.

FAO's latest forecast for world **trade** in total cereals in 2023/24 points to a 0.9-percent decline from the 2022/23 level despite a 1.1-million-tonne (0.2 percent) upward revision made this month, largely concerning wheat. The forecast for global wheat trade in 2023/24 (July/June) has been lifted from June by 1.6 million tonnes to 195 million tonnes, but still represents a 3.4-percent contraction from the 2022/23 record level. Expectations of larger sales by Canada, supported by better production prospects, and a stronger demand from China (mainland) than previously anticipated, underpin this month's upward revision. At 221 million tonnes, the forecast for trade in coarse grains in 2023/24 (July/June) is nearly unchanged since last month and down just marginally (0.3 percent) from the 2022/23 level. Global maize trade is seen contracting in 2023/24 by 0.8 percent, with import demand from the European Union anticipated to retreat from its high level in 2022/23 and exports from Ukraine forecast to fall, along with a likely decline in sales from Paraguay after rising to a record in 2022/23. World trade of barley is also predicted to contract in 2023/24, mostly reflecting a foreseen decline in sales from Australia and a weaker demand in Asia. By contrast, global sorghum trade is forecast to expand, bolstered by an expected recovery in sales by the United States of America and larger purchases by China (mainland). Largely reflecting downscaled import expectations for Bangladesh, China (mainland) and Nigeria, FAO's forecast for international trade in rice in 2023 (January–December) has been lowered to 53.0 million tonnes, down 0.6 million tonnes from June's forecast and 5.1 percent

Table 2. Basic facts of world cereal situation

(million tonnes)

	2021/22	2022/23 est.	2023/24 f'cast	Change: 2023/24 over 2022/23 (%)
Production[I]	2 815.0	2 788.7	2 819.0	+1.1
Trade[II]	482.8	477.0	472.7	-0.9
Utilization	2 802.6	2 779.2	2 805.3	+0.9
Per caput cereal food use (kg/year)	148.5	148.7	148.4	-0.2
Stocks[III]	857.3	858.6	878.1	+2.3
World stock-to-use ratio (%)	30.8	30.6	30.6	-0.1

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

below the 2022 all-time high.

Aggregate production among LIFDCs remains stable in 2023

FAO's forecast for aggregate cereal production of the Low-Income Food-Deficit Countries (LIFDCs)[2] in 2023 stands at 138.2 million tonnes, marginally down from the five-year average and on par with the outturn in 2022.

Among LIFDCs in *Africa*, total cereal production in 2023 is forecast at a slightly below-average level of 106.1 million tonnes. The production downturn is mostly related to LIFDCs in *East Africa*, where an erratic distribution of rainfall has curbed harvest expectations in **Kenya**, **Ethiopia**, **the Sudan**, **Uganda** and **the United Republic of Tanzania**. In **the Sudan**, in addition to unfavourable rains, soaring prices and shortages of key inputs due to the ongoing conflict have significantly constrained plantings, further weighing on production prospects. In the coastal LIFDCs of *West Africa*, the main harvest period started in July and, based on average to above-average cumulative rainfall amounts, cereal production is forecast above the five-year average in 2023. Among the Sahalien countries, harvesting will start later in the year and outputs are forecast at average to above-average levels, reflecting favourable weather forecasts. However, concerns still remain regarding the persisting conflicts in the regions of Liptako-Gourma, Lake Chad and northern **Nigeria** that continue to undermine farmers' productive capacity and negatively affect local production. With the main season harvest completed by July, production among the LIFDCs in *Southern Africa* is pegged at an above-average level. However, cyclones and consequent flooding caused localised crop losses and damages in **Madagascar**, **Mozambique** and **Malawi**.

In *Asia*, aggregate cereal production in 2023 among LIFDCs is pegged at a slightly above-average level of 31 million tonnes. In *Near East Asian* countries, an erratic temporal distribution of rainfall and low cumulative amounts resulted in a below-average cereal output in **Afghanistan**. In **the Syrian Arab Republic**, near-average rainfall amounts since March helped crops to recover from earlier dry weather conditions and total cereal production is forecast at an above-average level in 2023. In *Central Asian* countries, mainly reflecting an even temporal and spatial distribution of rainfall, cereal production, mainly wheat, is forecast at an above-average level in 2023.

In *Central America*, production in 2023 is expected at a below-average level in

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

	5-year average	2022/23 est.	2023/24 f'cast	Change: 2023/24 over 2022/23 (%)
Cereal production[I]	139.8	138.5	138.2	-0.2
Utilization	182.3	187.6	188.2	+0.3
Food use	138.7	145.5	148.9	+2.3
Per caput cereal food use (kg per year)	142.2	141.8	141.5	-0.2
Feed	20.1	19.6	18.7	-4.5
End of season stocks[II]	45.7	43.7	42.0	-3.9

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

Table 4. Cereal production of LIFDCs
(million tonnes)

	5-year average	2022 est.	2023 f'cast	Change: 2023 over 2022 (%)
Africa (34 countries)	108.0	108.5	106.1	-2.2
East Africa	56.5	55.0	52.8	-4.0
Southern Africa	11.5	11.9	12.6	+5.9
West Africa	33.1	34.6	33.7	-2.6
Central Africa	7.0	6.9	6.9	+0.4
Asia (8 countries)	30.8	29.0	31.1	+7.0
CIS in Asia	9.9	10.1	10.1	-0.2
Far East	12.7	12.4	12.6	+0.9
Near East	8.2	6.4	8.4	+30.4
Central America and the Caribbean (2 countries)	1.0	1.0	1.0	-1.9
LIFDCs (44 countries)	139.8	138.5	138.2	-0.2

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

[2] The list of LIFDCs has been updated and now consists of 44 countries, three countries less than the previous list. These three countries: Bangladesh, Côte d'Ivoire and Ghana, all graduated out of the list based on an income criterion. Please see https://www.fao.org/countryprofiles/lifdc/en/ for further details.

Haiti, due to constrained availability of agricultural inputs and below-average rainfall amounts between March and May, which are foreseen to result in both low plantings and yields.

Higher import requirements among African LIFDCs

The total cereal import requirement for LIFDCs is forecast at 51 million tonnes in the 2023/24 marketing year, 10 percent above the five-year average. The growth mostly reflects below-average production prospects in *East African* countries in 2023, which follows two years of drought and an expected drawdown in stocks, necessitating the need to increase imports to bolster domestic supplies. Moderate increases in imports are forecast in *West African* countries, especially in several Sahalien countries where conflicts are eroding local agricultural productive capacity.

While international prices have declined since mid-2022, currency weakness in several LIFDCs is limiting the transmission to domestic markets, contributing to the still high food inflation rates. Given the high proportion of income that households in LIFDCs allocate to food purchases, the high inflation rates represent a significant burden on food access for the most vulnerable people and are aggravating their food insecurity levels.

Table 5. Cereal imports of LIFDCs

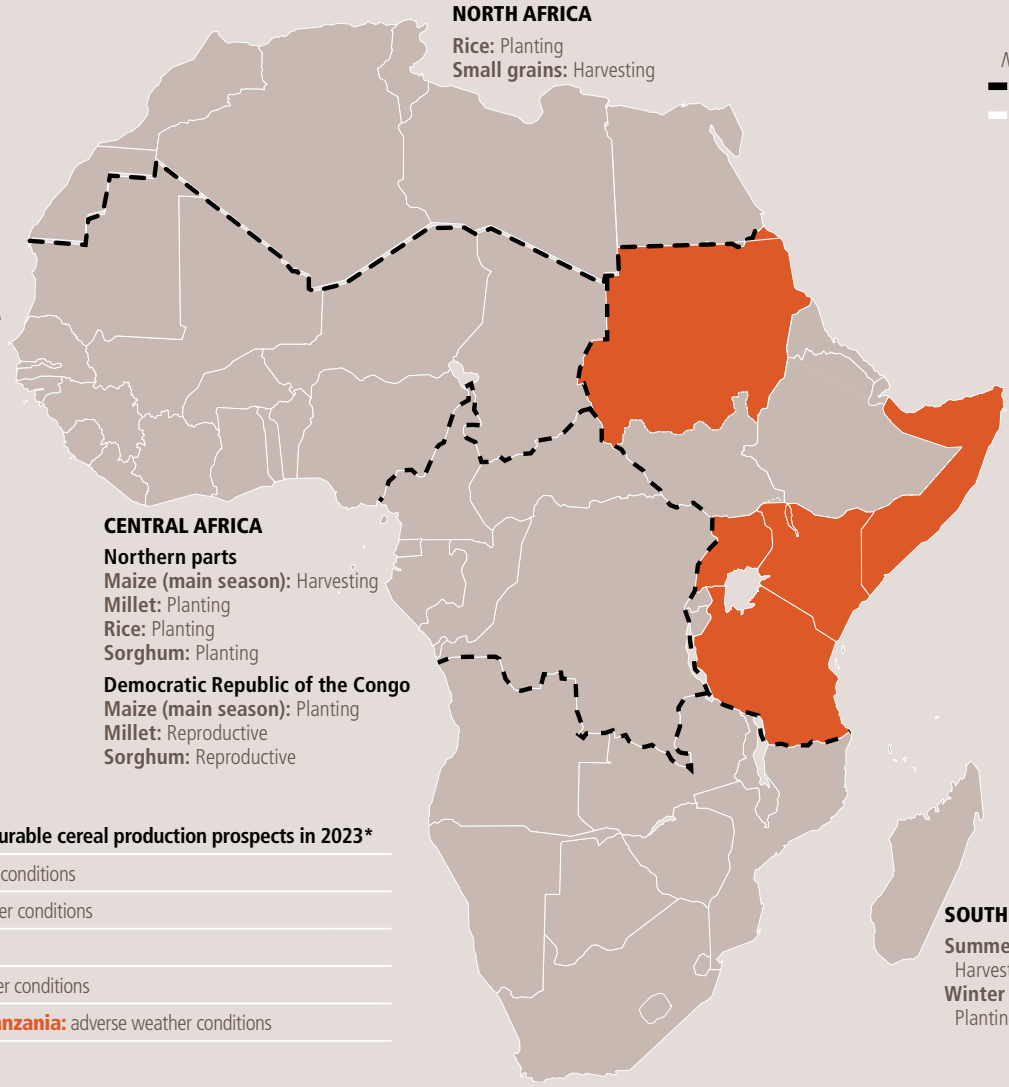
(thousand tonnes)

	2021/22 or 2022 Actual imports	2022/23 or 2023 Import estimate	2023/24 or 2024 Import requirement[1]
Africa (34 countries)	*29 471*	*28 769*	*30 236*
East Africa	*14 364*	*13 688*	*14 770*
Southern Africa	*3 106*	*3 500*	*3 105*
West Africa	*9 158*	*8 928*	*9 589*
Central Africa	*2 843*	*2 653*	*2 772*
Asia (8 countries)	*18 154*	*17 874*	*19 239*
Central Asia	*5 352*	*5 265*	*5 477*
Far East	*1 571*	*1 721*	*2 874*
Near East	*11 231*	*10 889*	*10 889*
Central America and the Caribbean (2 countries)	*1 442*	*1 402*	*1 522*
LIFDCs (44 countries)	*49 067*	*48 045*	*50 997*

Note: Totals computed from unrounded data.

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

REGIONAL REVIEWS
AFRICA



Countries with unfavourable cereal production prospects in 2023*

- **Kenya:** adverse weather conditions
- **Somalia:** adverse weather conditions
- **Sudan:** conflict
- **Uganda:** adverse weather conditions
- **United Republic of Tanzania:** adverse weather conditions

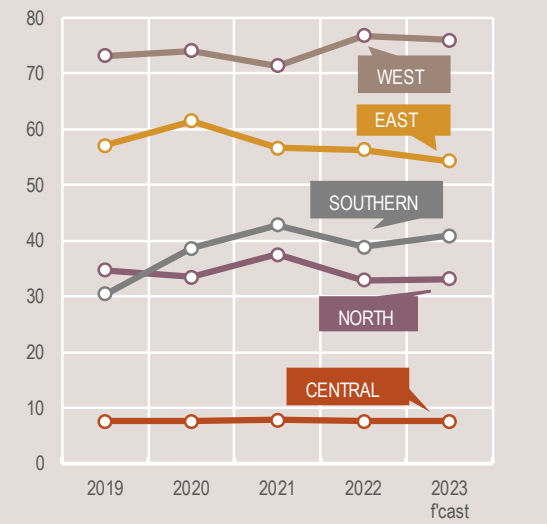
*/** See Terminology (*page 7*).
Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 2.* Cited 7 July 2023, modified to comply with the United Nations map No. 4045 Rev. 8, 2018.

Production Overview

Total cereal production in Africa is forecast at 212 million tonnes (rice in paddy terms) in 2023, 0.6 percent higher than the five-year average. The production upturn primarily reflects larger outputs in Southern Africa, where the main season crops have been harvested, and West Africa, with the main harvest period to start in August. While mostly conducive weather conditions in Southern African fostered an increase in planting and yields, cyclones in Malawi and Mozambique, and seasonal rainfall deficits in northern Namibia and southern Angola contained harvests. In West Africa, rainfall amounts have so far been above average, and are predicted to continue, supporting the good production prospects. In East Africa, with the main season crops yet to be harvested, erratic distribution of rains is seen to curb production in several countries, while in the Sudan the conflict has caused high prices and shortages of key agricultural inputs that significantly constrained plantings. Widespread drought conditions in western parts of North Africa resulted in a second consecutive below-average wheat harvest in 2023, the main cereal grown in the subregion.

Cereal production
(million tonnes)



NORTH AFRICA

Consecutive drought-affected seasons; second successive below-average cereal production in 2023

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

In **Morocco, Algeria** and **Tunisia,** where cereal cultivation is mostly rainfed, rainfall amounts and distribution were adequate at the onset of the season, facilitating planting operations and favouring early crop development. However, for the rest of the season, rainfall was erratic and insufficient in inland areas, constraining crop development and triggering widespread dry conditions across western parts of the subregion. Rainfall in areas close to the coast was characterized by a better temporal distribution. Above-average temperatures during critical crop development stages exacerbated the impacts of low rainfall quantities, leading to crop failures in parts of northeast **Morocco** and central areas of **Algeria** and **Tunisia.** Although the subregion is prone to dryness, the unfavourable conditions in 2023 were preceded by a widespread drought in **Morocco** and parts of **Algeria** in 2022.

The 2023 wheat production in **Morocco** is estimated at about 3.4 million tonnes, about 23 percent below the five-year average, although a recovery of 48 percent compared to the harvest in 2022 when the drought was more severe. In **Algeria,** wheat production in 2023 is expected at 2.5 million tonnes, a below-average level. In **Tunisia,** such widespread drought conditions have not occurred for over two decades, and the current drought curbed wheat production to 700 000 tonnes, 40 percent below the five-year average. In **Egypt,** the 2023 wheat output is estimated at a slightly above-average level of 9.7 million tonnes, on account of larger plantings and broader use of improved seed varieties that are adapted to local conditions, while most of the wheat crop is also produced under irrigation limiting the effects of reduced rainfall.

The subregion's aggregate cereal production in 2023 is estimated at 33.1 million tonnes, including 16.7 million tonnes of wheat and 2.6 million tonnes of barley. The total output in 2023 is about 10 percent below the average and close to the outturn of the previous year.

Import requirement to increase

The subregion's aggregate cereal import requirement in the 2023/24 marketing year (July/June) is forecast at 51 million tonnes (wheat accounts for 60 percent of this quantity), about 2 percent more than the five-year average as countries need to compensate for decreased domestic production. A larger increase in import requirements was prevented by adequate stock levels in some countries which have been accumulated in the previous marketing year when, despite high global prices, imports increased with the aim to improve local preparedness in case of future market shocks.

The subregion traditionally relied on imports from the northern part of the Black Sea region (the Russian Federation and Ukraine). Following the start of the war in Ukraine in February 2022, which altered the landscape of international trade and added additional uncertainty to markets, countries in the subregion started to import from other origins. In **Morocco**, for example, 23 percent of total wheat imports in 2021 were sourced from Ukraine and less than 5 percent from the Russian Federation, while in 2022 only 1 percent of the total wheat imports originated from Ukraine and there were no imports from the Russian Federation.

Food inflation rates remain at elevated levels

Across the subregion, with the exception of **Libya**, year-on-year food inflation rates were at substantially high levels or even increased in 2023, reflecting weak national currencies while international commodity prices generally declined from their peaks.

In **Morocco**, the annual food inflation rate increased from single digit values in early 2022 to over 10 percent in June 2023, reaching a record high of 20.8 percent in February 2023. Since March 2023, it fluctuated between 15 and 16 percent, registering 16.1 percent in May 2023. In **Egypt**, where a large share of unsubsidized products, such as protein sources, perishable fresh food and vegetables, is present in the Consumer price index (CPI), the inflation rate increased from single digits in the last quarter of 2021 to 22 percent in September 2022 and accelerated rapidly to 48 percent in January 2023. Reflecting the impact of the seasonal demand during the Holy Month of Ramadan, the annual

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
North Africa	18.3	16.6	16.7	11.7	11.0	10.7	5.4	5.4	5.7	35.4	33.0	33.1	+0.5
Algeria	3.2	3.0	2.5	1.4	1.1	1.1	0.0	0.0	0.0	4.6	4.1	3.6	-12.3
Egypt	8.9	9.7	9.7	8.0	8.5	8.1	5.3	5.3	5.6	22.3	23.5	23.4	-0.6
Morocco	4.8	2.5	3.7	1.7	0.8	1.3	0.1	0.1	0.1	6.6	3.3	5.0	+51.2
Tunisia	1.2	1.3	0.7	0.6	0.6	0.2	0.0	0.0	0.0	1.8	1.8	0.9	-48.5

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

food price inflation reached 62.9 percent in March 2023, a new record. The latest reading in May 2023 shows a marginal decline to 60 percent. In **Tunisia**, in May 2023, the annual food inflation rate reached a new record level of 15.9 percent, after lingering at levels close to 15 percent for the past seven months. In **Algeria**, food prices increased by 14 percent year-on-year in April 2023, a decline from the record level of 17.3 percent in June 2022. In **Libya**, the annual food inflation rate between September and December 2022 (last available data as of June 2023) fluctuated between 3.6 and 4.2 percent, the lowest levels in the subregion.

Although the continued presence of consumer price subsidies for several basic food items has prevented the complete transmission of elevated international food prices to the domestic retail markets, inflation rates remain high, curbing households' purchasing power, particularly for the most vulnerable groups.

According to the 2023 Libya Humanitarian Needs Overview, about 300 000 people (less than 4 percent of the population) are estimated to be in need of humanitarian assistance in 2023, down from 800 000 people (10 percent of the population) in 2022.

WEST AFRICA

Favourable weather conditions boost yield prospects in coastal countries

In bimodal rainfall areas of coastal countries along the Gulf of Guinea, harvesting of the 2023 main season maize crops started in early July and will conclude in August. Production prospects for these crops are favourable, based on average to above-average cumulative rainfall amounts during the 2023 March–July season that are supporting good yield expectations.

In central and northern unimodal rainfall areas, planting of the 2023 sorghum and millet crops concluded in April, while in Sahelian countries, sowing of the 2023 crops began in June under generally favourable weather conditions. According to the latest Forum of the Agro-Hydro-Climatic Seasonal Forecast in Sudano-Sahelian Africa (PRESASS), average to above-average rainfall amounts are forecast between July and September 2023 across much of the subregion. These rainfall conditions are expected to support good crop yields in 2023, but abundant rainfall and above-average runoff that are also forecast in most river basins in the Sahel, raise the risk of flooding and localized crop losses. Furthermore, there are concerns that the persisting conflicts in the regions of Liptako-Gourma, Lake Chad and northern Nigeria will continue to undermine farmers' productive capacity and negatively affect local production.

Prices of coarse grains higher year-on-year

In **Ghana,** prices of sorghum, maize and millet in May 2023 were up to 75 percent above their elevated year-earlier levels. The high prices are the result of persistent inflationary pressures due to the depreciation of the national currency, as well as the elevated international commodity prices and higher transport costs. In **Nigeria,** prices of maize and millet registered seasonal increases of 5 to 20 percent between January and April 2023. On a yearly basis, prices of these cereals were up to 25 percent higher, reflecting market disruptions due to insecurity, persistent shortages of cash

Table 7. West Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
West Africa	52.6	54.6	52.6	21.3	22.1	23.3	74.0	76.8	76.0	-1.1
Burkina Faso	4.6	4.7	4.6	0.4	0.4	0.5	5.0	5.2	5.0	-2.9
Chad	2.6	2.6	2.5	0.3	0.2	0.3	2.8	2.8	2.8	+0.2
Ghana	3.5	4.1	3.6	1.0	1.2	1.4	4.5	5.3	4.9	-6.9
Mali	7.0	7.2	7.1	2.9	2.9	3.1	10.0	10.1	10.2	+1.1
Niger	5.2	5.8	5.1	0.1	0.1	0.1	5.3	5.9	5.2	-11.9
Nigeria	21.4	21.6	21.4	8.4	8.5	9.0	29.9	30.2	30.5	+0.9

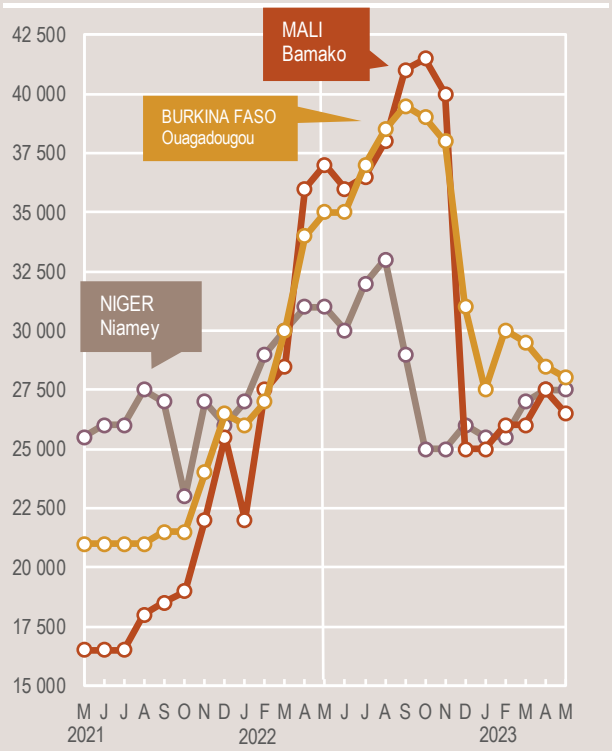
Notes: Production data is from early November 2022 and does not include figures from the latest CILSS meeting. Totals and percentage change computed from unrounded data. The five-year average refers to the 2018-2022 period.

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

and a currency depreciation that pushed up production and distribution costs. By contrast, sorghum prices were generally stable and below or near their year-earlier levels in April 2023. In both **Benin** and **Togo,** prices of maize and sorghum were near or below their year-earlier levels in May.

Prices of coarse grains were higher year-on-year in some Sahelian countries. In **Chad,** prices of maize, millet and sorghum remained generally stable between February and April, and were between 5 and 25 percent above their elevated year-earlier levels. Low supplies, high transport costs and strong demand, particularly in eastern areas that have seen an upturn in demand from the Sudan for Chadian products, have supported the higher prices. In **Senegal,** national average prices of maize and millet remained stable between February and April, while prices of sorghum rose by 5 percent. In spite of the above-average 2022 cereal harvest, prices of maize, sorghum and millet were between 20 and 45 percent above their elevated year-earlier values. In other Sahelian countries, prices of coarse grains were below their year-earlier levels, reflecting a higher year-on-year domestic cereal output in 2022. In **Burkina Faso,** prices of sorghum and millet were 5 to 25 percent below their elevated year-earlier levels in May. In **the Niger,** prices of sorghum and millet registered seasonal increases up to 10 percent between February and May, but were between 5 and 20 percent below their year-earlier levels. In **Mali,** prices of millet registered slight seasonal increases in the first five months of 2023, except in markets located in conflict-affected areas, including Tombouctou and Gao, where prices rose by 17 and 50 percent, respectively. However, prices of both sorghum and millet were generally between 20 and 30 percent below their very high year-earlier values.

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



Alarming levels of acute food insecurity during the 2023 lean season

According to the latest "Cadre Harmonisé" (CH) analyses, at the subregional level, about 42.49 million people are estimated to be acutely food insecure (CH Phase 3 [Crisis] and above), including 2.37 million people in CH Phase 4 (Emergency) and 45 201 people in CH Phase 5 (Catastrophe). This is the highest figure on record since the start of the CH analyses in 2013 and above the 38.32 million people estimated to be acutely food insecure in 2022. However, this increase is also due to an expanded geographical coverage of the analyses. The highest number of acutely food insecure people is in **Nigeria,** where about 24.86 million people need urgent food assistance, followed by **Burkina Faso** (3.35 million), **the Niger** (3.28 million), **Chad** (1.86 million), **Ghana** (1.37 million), **Senegal** (1.26 million), **Mali** (1.26 million), **Sierra Leone** (1.18 million) and **Côte d'Ivoire** (1.02 million).

Persisting conflict and worsening civil insecurity remain the key drivers of acute food insecurity in the Liptako-Gourma Region, overlapping **Mali**, **the Niger** and **Burkina Faso**, and the Lake Chad Basin as well as in northern **Nigeria**. In the first quarter of 2023, the number of violent incidents in these countries was as high as in the same period of 2022. The use of siege tactics by non-state armed groups has severely disrupted markets and livelihoods, aggravating acute food insecurity in the Sahel region in **Burkina Faso**, where about 40 000 people are projected to be in CH Phase 5 (Catastrophe). CH Phase 5 (Catastrophe) levels of food insecurity are also expected for about 3 000 people in the country's conflict-affected Boucle du Mouhoun Region and for about 2 500 people in the Ménaka Region of **Mali**, where humanitarian access remains limited. In **Nigeria**, several areas in the northeast remain inaccessible, while increasing banditry and kidnapping have constrained livelihood activities in northwest and northcentral states. The spread of violence from central Sahel to northern **Benin**, **Côte d'Ivoire**, **Ghana**, **Guinea** and **Togo** is also a cause for serious concern.

The high levels of insecurity continued to cause large population displacements. In May 2023, over 6.7 million people were estimated to be internally displaced in **Burkina Faso**, **Chad**, **Mali**, **the Niger** and **Nigeria**, an increase of over 10 percent compared to the same period in 2022. At the same time, these countries host about 1.2 million refugees, a number expected to increase further considering the recent deterioration of security conditions as well as the escalation of the armed conflict in **the Sudan**, which has forced large numbers of people to flee to neighbouring countries, including **Chad**.

Macroeconomic crises are also a key factor underpinning acute food insecurity, constraining food access. Slow economic growth, currency depreciations and high inflation rates, particularly in **Nigeria**, **Ghana** and **Sierra Leone**, are having a negative impact on households' purchasing power.

CENTRAL AFRICA

Agricultural production continues to be constrained by conflicts, displacements and high input prices in 2023

Sowing of the 2023 secondary season maize crop, to be harvested from May, is underway in bimodal rainfall areas of **the Republic of the Congo**, **Gabon** and in northern provinces of **the Democratic Republic of the Congo**. Weather conditions have been overall conducive since December 2022 in most cropland areas. In central provinces of **the Democratic Republic of the Congo**, sowing of the 2023 secondary season maize crop, to be harvested between March and May, started in November 2022 under favourable weather conditions in most areas. In South Kivu and North Kivu provinces, above-average rainfall amounts in November and December 2022 triggered localized flooding and hampered planting operations. In the southernmost unimodal rainfall areas of **the Democratic Republic of the Congo**, planting of maize crops, to be harvested from May, finalized in January. Planting of the 2023 main season maize crop will begin in mid-March in **Cameroon** and in **the Central African Republic,** and the harvest is expected to take place from July.

Weather forecasts until April 2023 point to near-average rainfall amounts across the subregion, with likely positive impact on yields. Nevertheless, the ongoing insecurity and displacements in **the Central African Republic**, eastern areas in **the Democratic Republic of the Congo** and Far North, Northwest and Southwest regions of **Cameroon** are expected to continue affecting agricultural activities. In addition, elevated international prices of fertilizers and improved seeds, both largely imported, are constraining farmers' access to agricultural inputs, resulting in either low application rates, with negative effects on yields and/or area planted.

Prices of imported food remain at high levels

Due to high international quotations, domestic prices of imported food products, such as rice, wheat flour and vegetable oil, remained at high levels in the last quarter of 2022 compared to previous years. As of December 2022, prices of rice were on average about 15 percent higher than a year before in Cameroon and the Central African Republic. In **Cameroon**, prices of wheat flour were up to 50 percent above their levels in December 2021. In **the Central African Republic**, food prices surged in early 2023, following the government's decision to suspend the state subsidy for the sale of fuel, which resulted in a sharp increase of transport costs.

Over 30 million people acutely food insecure in early 2023

During the first quarter of 2023, about 30.8 million people are estimated to be facing severe acute food insecurity in **the Democratic Republic of the Congo**, **Cameroon** and **the Central African Republic**, one-quarter of the aggregate population. Conflicts and insecurity continued to cause population displacements and widespread disruption of agricultural and market activities with negative consequences on food availability and access. The high food prices and transport costs, coupled with very limited employment opportunities, have substantially reduced households' purchasing power, especially in urban areas, where most households rely on markets to access food.

In **the Central African Republic**, the most recent Integrated Food Security Phase Classification (IPC) analysis estimated that 2.4 million people are acutely food insecure (IPC Phase 3 [Crisis] and above), between April and August 2023. In **Cameroon**, according to the November 2022 Cadre Harmonisé (CH) analysis, the number of acutely food insecure people (CH Phase 3 [Crisis] and above) was projected to reach 2.4 million in the June-August 2023 period. In **the Democratic Republic of the Congo**, according to the latest IPC analysis, 25.8 million people (about 25 percent of the total population) were projected to experience acute food insecurity between January and June 2023.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Central Africa	5.9	5.9	5.9	1.8	1.7	1.7	7.7	7.6	7.6	+0.3
Cameroon	3.5	3.5	3.5	0.3	0.3	0.3	3.8	3.8	3.8	+1.3
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.2	0.2	+1.3
Democratic Republic of the Congo	2.2	2.2	2.2	1.4	1.4	1.4	3.6	3.6	3.6	-0.9

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

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

EAST AFRICA

Unfavourable production prospects in several countries due to erratic rains

In central and southern parts of the subregion, including **Burundi, Rwanda,** southeastern **Kenya, Somalia, the United Republic of Tanzania** and **Uganda,** harvesting of the 2023 main season cereal crops is underway or about to start. The March–May rainy season was characterized by an erratic temporal distribution and consequently production prospects are unfavourable in **Somalia,** southeastern **Kenya, Uganda** and **the United Republic of Tanzania.** In key cropping areas of southern **Somalia** and in southeastern and coastal marginal agriculture areas of **Kenya,** prospects for the "Gu" and the "long-rains" harvests, respectively, are particularly unfavourable. In these areas, rainfall amounts during most of the growing period were below average, except for some heavy showers in April and May, which accounted for more than half of the seasonal cumulative precipitation and triggered flash floods. In **Somalia**, in addition, abundant rains in upstream areas in **Ethiopia** resulted in the overflow of Juba and Shabelle rivers, with significant losses of crops in key producing riverine areas. In **Uganda,** yields have been affected by below-average precipitation amounts in bimodal rainfall areas which cover most of the country, where first season crops are being harvested, as well as in unimodal rainfall northeastern Karamoja Region, where crops will be harvested from September. In **the United Republic of Tanzania,** harvesting of the "Masika" and "Msimu" crops is underway in northeastern bimodal rainfall areas and in central and southern unimodal rainfall areas, respectively, and production is estimated at below-average levels due to erratic seasonal rains. In central and southern areas, where the bulk of the national cereal output is produced, significant yield reductions are expected on account of prolonged dry spells in February and Fall Armyworm infestations. In southern bimodal rainfall areas of **South Sudan,** above-average rainfall amounts were received in Western Equatoria State, while below-average precipitation amounts resulted in crop wilting in parts of Central and Eastern Equatoria states, with a negative impact on yields of first season crops. In **Rwanda** and **Burundi,** the February–May "2023B" rainy season was characterized by low rainfall amounts in February followed by abundant precipitation in March and April, which improved vegetation conditions and lifted production prospects for cereal crops, currently being harvested. However, in **Rwanda,** the mid and late season heavy rains triggered floods that resulted in localized crop losses.

In **Ethiopia,** central and northern **South Sudan, the Sudan** and in southwestern **Kenya,** cereal crops are at varying stages of development. In major growing areas of Central, Rift Valley and Western provinces of **Kenya,** "long-rains" crops, to be harvested from September, benefited from average to above-average rainfall amounts. In Southern Tigray, eastern Amhara, eastern Oromiya and northeastern SNNP regions of **Ethiopia,** harvesting of the 2023 secondary "Belg" season crops started in June. Abundant seasonal rainfall amounts, up to twice the long-term average, benefited yields and the total "Belg" cereal harvest is expected to be above average in 2023, despite localized flood-induced crop losses in Oromiya and SNNP regions. Planting of the 2023 main season crops, for harvest from October, is well underway in key producing areas of western Oromiya, western Amhara and Benishangul Gumuz regions of **Ethiopia** ("Meher" crops), in **the Sudan** and in central and northern unimodal rainfall areas of **South Sudan.** According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), rainfall totals between June and September are expected to be below average across most cropping areas of these countries, with foreseen negative impacts on yields. In **Ethiopia,** the lingering impact of the conflict in Tigray resulted in shortages of agricultural inputs, including seeds, draft oxen and fertilizers, and constrained plantings for the "Belg" season crops (in Southern Tigray and Eastern Amhara) and "Meher" season crops (in the rest of Tigray Region and Western Amhara). However, the improved security situation following the ceasefire agreement of November 2022 is expected

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[I]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
East Africa	6.6	6.7	6.5	46.9	45.8	43.6	58.1	56.4	54.3	-3.7
Ethiopia[II]	5.5	5.8	5.5	23.1	22.9	21.8	28.8	29.0	27.5	-5.0
Kenya	0.3	0.3	0.3	3.9	3.3	3.6	4.4	3.8	4.1	+9.2
Sudan	0.7	0.5	0.6	6.6	7.0	5.5	7.3	7.5	6.0	-19.1
Uganda	0.0	0.0	0.0	3.5	3.1	3.1	3.8	3.3	3.4	+1.6
United Republic of Tanzania	0.1	0.1	0.1	7.6	7.2	7.4	11.2	10.2	10.6	+4.5

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

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

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

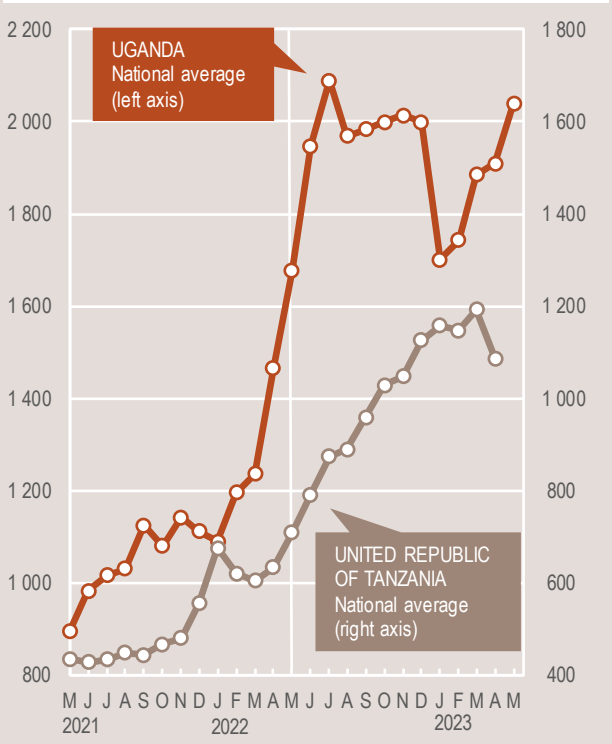
to result in increased cereal production in 2023. In **the Sudan,** soaring prices and shortages of key inputs, including fuel, seeds, agrochemicals and labour due to the ongoing conflict are expected to significantly constrain planted area and hence cereal production. In **South Sudan,** although at the national level the scale of the conflict has diminished significantly, increased incidences of organized violence at the subnational level continue to disrupt agricultural operations.

A widespread and severe drought that stretched for more than two years across southern **Ethiopia,** central and eastern **Somalia** and northern and eastern **Kenya,** resulted in the death of 9.5 million animals, as of late 2022, and widespread distress sales. Rangeland conditions have recovered substantially by mid-2023 due to abundant March–May rains and as a result there has been a significant improvement in livestock body conditions. Milk production also increased but quantities remain well below average due to low conception rates and the decline of herd sizes.

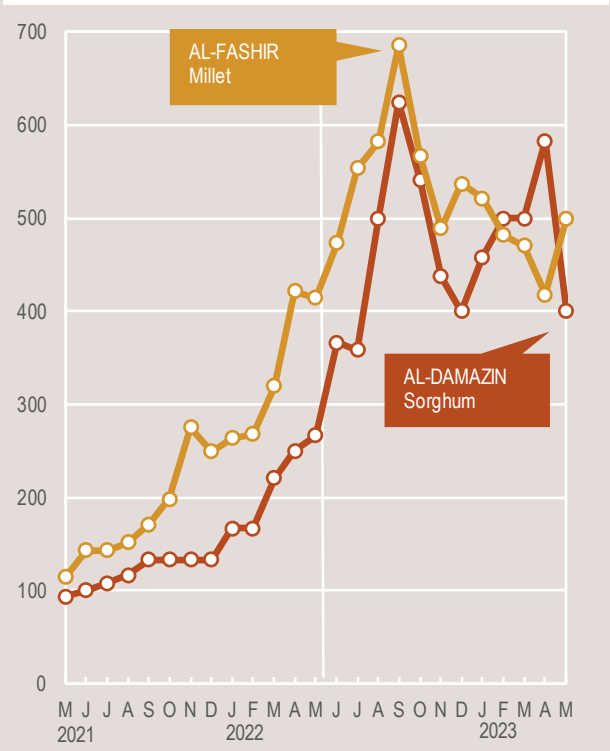
Food prices soaring in the Sudan due to market shortages and trade disruptions caused by the conflict

In **the Sudan,** food prices have surged in April and May due to trade and market disruptions caused by the conflict. These increases occurred on top of already high costs of food, as prices of domestically produced sorghum and millet, the main cereal staples, were in March up to 60 percent higher year-on-year. According to the World Food Programme (WFP), the price of a local food basket is projected to increase by 25 percent between June and September if the conflict continues, having already risen by 28 percent in the year to March 2023. In **South Sudan**'s capital, Juba, prices of sorghum and maize began to increase seasonally in May, rising by 4 percent. Prices in May were at exceptionally high levels, almost double the level of a year earlier, mainly due to the protracted macroeconomic challenges and insufficient domestic supplies. In **Kenya,** between January and May, prices of maize increased seasonally by up to 30 percent in southwestern key growing areas of Rift Valley Province and in the capital, Nairobi. Prices in May were 45–75 percent above their year-earlier levels, reflecting tight domestic supplies and high prices of agricultural inputs. In **Uganda,** prices of maize increased by 20 percent between January and May, with seasonal patterns exacerbated by concerns over the performance of the 2023 first season harvest. Prices in May were at near-record

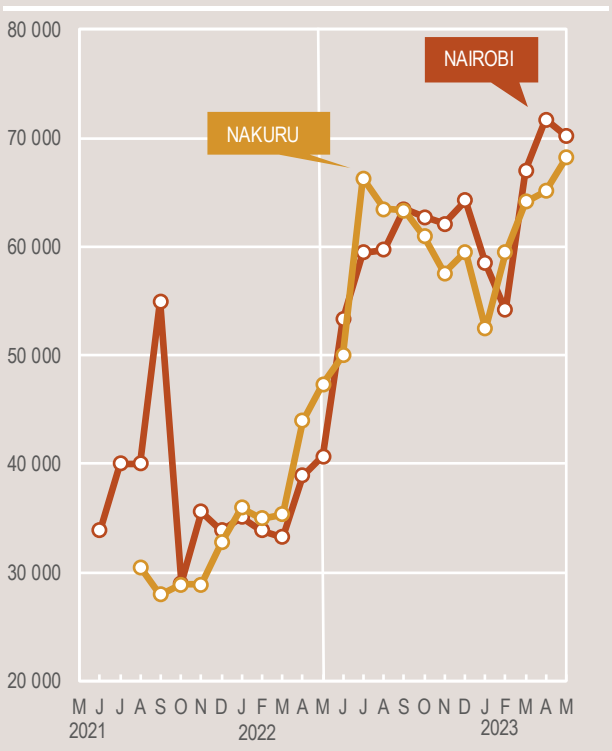
Maize prices in selected East African markets



Retail prices of maize and sorghum in the Sudan

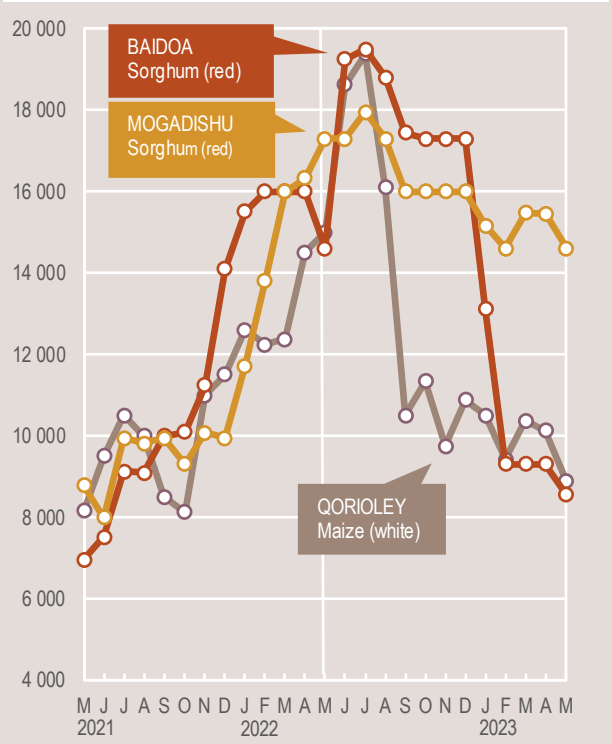


Wholesale prices of white maize in Kenya



levels due to tight supply, sustained export demand and high fuel prices. In **Ethiopia,** prices of locally produced maize increased seasonally by 10–15 percent between January and April 2023, reaching record levels. The high cereal prices are mainly the result of the continuous depreciation of the national currency, which result in imported inflationary pressure. In **the United Republic of Tanzania,** despite a moderate decline in April in anticipation of the "Msimu" harvest, maize prices were more than 70 percent higher on a yearly basis, underpinned by tight supplies and sustained export demand. In **Somalia,** prices of locally produced sorghum began to increase seasonally in March rising by 5–15 percent. Overall, prices of cereals in March were around or below their elevated values of a year earlier.

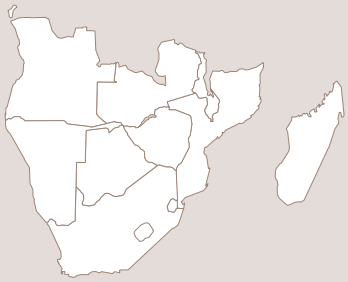
Retail prices of maize and sorghum in Somalia
(Somali shilling/kg)



Dramatic increase in acute food insecurity in the Sudan due to the ongoing conflict

In **the Sudan,** the conflict that broke out in mid-April 2023 severely disrupted livelihoods, paralyzed economic activities and triggered large-scale population displacements. About 19.9 million people require emergency food and livelihood assistance, 70 percent up from the pre-conflict estimate. In **Somalia,** northern and eastern **Kenya** and southern **Ethiopia,** a prolonged drought, which affected livelihoods between late 2020 and early 2023, caused consecutive failed harvests and widespread livestock deaths, and resulted in a dire food security situation. In **Somalia,** about 6.6 million people are estimated to face severe acute food insecurity between April and June 2023. This figure includes about 40 350 people in IPC Phase 5 (Catastrophe) and amounts to almost 40 percent of the analysed population, compared to 33 percent in the same period of the previous year. In **Kenya,** in the 23 counties classified as rural Arid and Semi-Arid Lands (ASAL), covering most of the country, about 5.4 million people are estimated to face severe acute food insecurity between March and June 2023. This figure amounts to 32 percent of the analysed population, compared to 27 percent in the same period of the previous year. In **Ethiopia,** according to the 2023 Humanitarian Response Plan, about 20.1 million people are estimated to face severe acute food insecurity in 2023. This figure includes about 11 million people in southern pastoral areas of Southwest Ethiopia Peoples' Region, southern SNNPR, Borena zone in southern Oromiya Region and southern Somali Region, which have been affected by the drought. In **South Sudan,** about 7.76 million people, almost two-thirds of the total population, are estimated to face severe acute food insecurity between April and July 2023, slightly up from the same period of the previous year. Major concerns exist for households in Akobo, Canal/Pigi and Fangak counties of Jonglei State and for Leer and Mayendit counties of Unity State, where about 43 000 people are expected to face IPC Phase 5 (Catastrophe). The main drivers of the dire food security situation are the protracted macroeconomic crisis, insufficient food supplies, livelihood losses in areas affected by floods and episodes of intercommunal violence.

SOUTHERN AFRICA



Above-average 2023 cereal production, but weather extremes caused localized production shortfalls

Harvesting of the 2023 summer cereal crops is nearing completion, while the minor winter wheat crop is expected to be harvested in September and October. At the subregional level, total cereal production in 2023 is forecast at an above-average level of 40 million tonnes, moderately higher year-on-year, reflecting generally conducive weather conditions in the main producing countries. However, in the second half of the season, periods of dry weather conditions and tropical cyclones curbed yields in several countries and resulted in localized shortfalls in cereal production.

In **South Africa,** maize production is estimated at 17 million tonnes in 2023, the second largest output on record, as above-average yields offset the impact of a cutback in plantings. Winter wheat crop conditions are generally satisfactory, and production is pegged at an above-average level of 2.1 million tonnes, slightly lower year-on-year due to a moderate reduction in plantings and reflecting downside risks associated with ongoing power interruptions on agricultural operations. Production estimates in **Zambia** put the 2023 maize output at 3.3 million tonnes, about 8 percent above the five-year average, mainly driven by a sizeable expansion in plantings. In **Zimbabwe,** official production estimates indicate that the country harvested an above-average maize crop in 2023. In **Madagascar** and **Mozambique,** rainfall deficits in northern areas reduced cereal yields, while weather conditions were more conducive in the main central cereal producing regions. Tropical Cyclone Freddy traversed both countries in February and March, causing localized flooding and crop damage. As a result, national cereal outputs are anticipated at near-average levels in 2023. Cyclone Freddy caused widespread flooding and extensive crop damage and losses in **Malawi,** largely concentrated in southern districts. However, weather conditions were generally favourable in key central and northern growing areas and consequently national maize production is estimated at about 3.6 million tonnes, comparable with the five-year average; substantial production shortfalls are, however, estimated in the south. Following initial favourable rainfall at the end of 2022 that facilitated planting activities, dry weather conditions in March and April 2023, an important period for yield development, adversely affected cereal crops in southern **Angola** and across northern **Namibia,** causing extensive crop wilting and reducing yields. Total cereal production in **Namibia** is, however, estimated to be slightly above the five-year average in 2023, as a large outturn from the commercial sector, mostly irrigated maize, is estimated to have compensated for reduced harvests of millet and sorghum, mainly grown by small-scale farmers. In **Eswatini** and **Lesotho,** countries that import large quantities of cereals to fulfil domestic consumption needs, the 2023 harvests are expected at levels slightly above the five-year average, owing to generally beneficial weather conditions.

Despite the high global fertilizer prices at the start of the cropping season, there has not been a discernible impact on the subregion's cereal production in 2023. There was, however, a steep increase in soybean production, which can be partly attributed to the lower input requirements compared to other cereal crops. These reduced input needs and consequently lower production costs motivated farmers to increase soybean plantings; in **South Africa** production is estimated to have increased by 23 percent year-on-year in 2023, while production nearly doubled in **Zambia.**

Import requirements remain stable, amid moderate upturn in production

Owing to the small upturn in domestic production in 2023, cereal import requirements are estimated to remain unchanged year-on-year and at a near-average level of 8.6 million tonnes in the 2023/24 marketing year (generally April/March). Maize constitutes the bulk of imports and the largest proportion of imported grains is likely to be sourced from **South Africa**, which has ample availability following two years of above-average maize outturns; maize exports from South Africa are likely to stay above 3.5 million tonnes for a third consecutive year in 2023/24. Despite easing prices on the international market, currency weakness across the subregion is maintaining high import costs.

Cereal prices edged lower on harvest pressure, but still remained at elevated levels

In **South Africa,** the leading exporting country of the subregion, wholesale prices

Table 10. Southern Africa cereal production

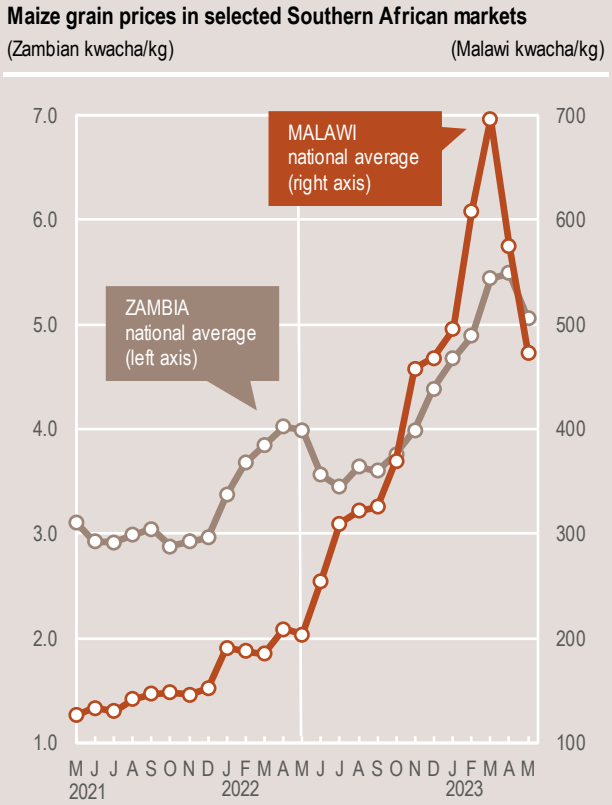
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Southern Africa	2.4	2.9	2.6	29.6	30.8	33.0	4.7	5.2	5.4	36.7	38.9	40.9	+5.3
excl. South Africa	0.4	0.6	0.5	14.2	14.2	15.4	4.7	5.2	5.4	19.3	20.0	21.3	+6.4
Madagascar	0.0	0.0	0.0	0.2	0.2	0.2	4.1	4.6	4.8	4.3	4.8	5.0	+3.9
Malawi	0.0	0.0	0.0	3.8	3.9	3.8	0.1	0.1	0.2	3.9	4.0	3.9	-2.5
Mozambique	0.0	0.0	0.0	2.3	2.3	2.3	0.4	0.4	0.4	2.7	2.7	2.7	+1.9
South Africa	2.0	2.2	2.1	15.4	16.6	17.5	0.0	0.0	0.0	17.4	18.9	19.6	+4.2
Zambia	0.2	0.3	0.3	2.9	2.7	3.3	0.0	0.1	0.1	3.1	3.1	3.7	+20.1
Zimbabwe	0.2	0.3	0.2	1.8	1.8	2.5	0.0	0.0	0.0	2.0	2.1	2.6	+27.4

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

of maize grain in May 2023 were more than 20 percent lower on a yearly basis, largely due to declining international prices and a good supply situation. At the retail level, although the food inflation rate eased in the second quarter of 2023, the intermittent electricity supply has raised operational costs along the food supply chain, limiting stronger disinflation. Prices of maize meal in **Botswana, Eswatini** and **Namibia** were at higher year-on-year levels, but generally stable in March and April owing to softer wholesale prices in South Africa, the main source of cereals for all three countries. The food inflation rate in **Angola** has fallen consistently since early 2022 and in May 2023 was about half its year-earlier level, albeit still high at 11 percent. An increase in petrol prices in early June 2023, following the removal of a price subsidy, and a depreciation of the national currency in May, after months of stability, could lead to an uptick in inflationary pressure. In **Malawi** and **Zambia,** the nominal national average prices of maize grain dropped seasonally in May 2023 from record-high levels of the preceding months, but still remained well above the year-earlier levels, in part underpinned by currency weakness and imported inflationary pressure. In **Zimbabwe,** following some declines in preceding months, there was an uptick in the annual food inflation rate in May 2023, when it reached 117 percent, up from 102 percent in the previous month. This largely reflects a sharp weakening of the currency, leading the government to implement several measures aimed at curbing inflationary pressure, including the removal of import duties on several key food products.

Maize grain prices in selected Southern African markets



Food security expected to improve, but persisting challenges of high prices and impact of extreme weather

At the subregional level, the prevalence of acute food insecurity is anticipated to fall moderately in 2023/24 compared to 2022/23 when the number of people in need of assistance peaked at 15.9 million (excluding South Africa) between January and March 2023. The anticipated improvement reflects the moderate upturn in cereal production in 2023 and some disinflation. However, significant food access constraints are expected to persist in 2023/24 given the still high price levels, currency weakness and limited economic growth prospects that impair income-earning opportunities. There are, in addition, several hotpots areas that are of particular concern, namely southern **Angola,** northern **Namibia** and southern **Malawi,** where adverse weather conditions resulted in poor agricultural outputs. Rural households in these areas are expected to face heightened levels of food insecurity on account of tighter food supplies and reduced income-earning opportunities from crop sales.

Looking farther ahead, the El Niño event, which is influencing global weather patterns, normally causes a reduction in rainfall amounts during the entire cropping season in Southern Africa, with the main season stretching from November to May. If typical El Niño-reduced rainfall patterns materialize, cereal production is likely be adversely affected, raising risks of reduced harvests and worsening food insecurity.

REGIONAL REVIEWS
ASIA

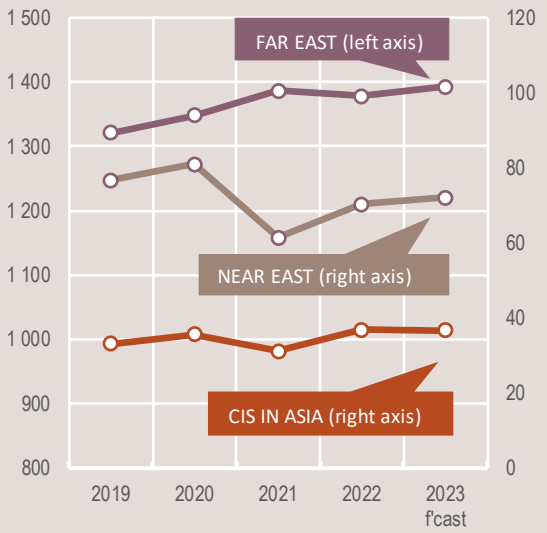
*/** See Terminology (*page 7*).
Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 2.* Cited 7 July 2023, modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Production Overview

Total cereal production in Asia is forecast at 1 502 million tonnes (rice in paddy terms) in 2023, a sizeable 4.3 percent increase relative to the previous five-year average. Most of the production growth originates in the large producers of Far East Asia, where remunerative prices drove up wheat plantings that underpinned a record-high wheat outturn in 2023. Prospects are generally favourable for the other main season cereal crops in 2023, however, in Myanmar insecurity is causing shortages and high prices of agricultural inputs, potentially curtailing production in 2023. In the Near East subregion, improved rainfall since March helped foster a recovery in crop conditions, following early seasonal dryness, and aggregate production is forecast at an above-average level in 2023. In Central Asia, larger plantings and generally good weather conditions are supporting favourable production prospects for wheat.

Cereal production
(million tonnes)



FAR EAST

Wheat production in 2023 forecast at a record level

Harvesting of the 2023 wheat crop (mainly irrigated) is nearing completion and the subregion's aggregate production is forecast at an all-time high of 279.8 million tonnes, reflecting a record wheat acreage and good yield prospects. In **China (mainland),** the 2023 wheat output is forecast at 138 million tonnes, marginally above last year's high level. Untimely rains in central and southern areas during the harvest period, may cause a slight reduction in the quality of the wheat crop and localized crop losses in affected areas. In **India,** wheat production is estimated at an all-time high of about 110 million tonnes, mostly reflecting record plantings supported by remunerative minimum support prices guaranteed by the government. In **Pakistan,** the wheat production in 2023 is estimated at an above-average level of 26.8 million tonnes, owing to above-average area planted and yields. In **Bangladesh, Nepal** and **Mongolia,** the 2023 wheat outputs are forecast at bumper levels.

Plantings of 2023 paddy and maize crops forecast above average

In Northern Hemisphere countries, planting operations of the 2023 main rice and coarse grains crops, to be harvested towards the end of the year, started in late May. In countries along or south of the Equator, the 2023 main season harvests recently concluded and farmers are currently engaged in planting activities of the 2023 secondary crops.

At the subregional level, above-average areas are forecast for paddy, as well as the maize crop reflecting strong demand of the feed industry. In addition, declining global prices of agricultural inputs since mid-2022 may also encourage farmers to increase the area planted with 2023 main season crops.

Since April 2023, precipitation amounts were average to above average in most countries of the subregion, benefiting planting operations and early development of the 2023 main crops. Several heatwaves in May and early June in parts of **India, the Lao People's Democratic Republic, Cambodia** and **the Philippines** negatively affected soil moisture levels and resulted in slight delays in planting operations. In these areas, if rains improve in the next few weeks, planting progress is expected to pick up and the areas sown could reach last year's above-average level. Overall, the outcome of the main season will depend on the pattern of the 2023 monsoon rainfall (June–September) that, according to weather forecasts, is likely to be near average in many countries of the subregion. However, in northern **Myanmar**, southern **Viet Nam**, southern **Lao People's Democratic Republic** and large areas of **Indonesia** and **Timor-Leste**, weather forecasts point to a higher-than-normal likelihood that rainfall amounts will be below average between July and October 2023. This is consistent with typical El Niño-influenced weather patterns, which are predicted to occur in 2023/24 and could affect the development of 2023 main season crops and irrigation water availability for the 2023 secondary crops; the effects on agricultural production will very much depend on the timing and intensity of the phenomenon.

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

In the 2023/24 marketing year, subregional cereal exports are forecast at 58.6 million tonnes (rice in milled terms), over 10 percent above the five-year average. Most of this quantity is milled rice, forecast in the 2023 calendar year at 46.2 million tonnes. Small quantities of maize are exported annually and, in 2023/24, they are expected to increase to well above-average levels due to a robust export demand. By contrast, wheat shipments in 2023/24 are forecast at a level below the previous five-year average, reflecting reduced export prospects for **India,** the leading exporter in the subregion, following the implementation of wheat export

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Far East	271.0	276.7	279.8	389.3	405.5	410.0	688.8	695.9	703.1	1 349.1	1 378.1	1 392.9	+1.1
Bangladesh	1.1	1.2	1.2	4.1	4.8	4.8	56.0	57.8	58.7	61.2	63.7	64.7	+1.5
Cambodia	0.0	0.0	0.0	0.9	0.7	0.8	11.3	11.6	12.3	12.2	12.3	13.1	+6.5
China (mainland)	134.8	137.7	138.0	276.1	287.5	291.5	211.0	208.5	209.3	621.9	633.7	638.8	+0.8
India	105.7	107.7	110.0	49.1	51.9	51.5	186.0	196.2	196.5	340.8	355.9	358.0	+0.6
Japan	1.0	1.0	1.1	0.2	0.2	0.2	10.5	10.4	10.3	11.7	11.6	11.6	-0.1
Myanmar	0.1	0.1	0.1	2.4	2.4	2.4	26.6	24.7	25.9	29.2	27.2	28.4	+4.6
Nepal	2.1	2.1	2.1	3.1	3.0	3.1	5.5	5.5	5.3	10.6	10.6	10.5	-1.2
Pakistan	25.7	26.4	26.8	9.2	10.4	10.5	11.9	11.0	13.0	46.9	47.8	50.3	+5.3
Philippines	0.0	0.0	0.0	8.1	8.3	8.4	19.4	20.0	19.8	27.5	28.3	28.2	-0.4
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.0	5.0	4.9	5.3	5.2	5.2	-1.1
Sri Lanka	0.0	0.0	0.0	0.3	0.2	0.3	4.4	3.4	4.0	4.7	3.6	4.3	+20.4
Thailand	0.0	0.0	0.0	5.0	5.4	5.4	32.0	34.4	34.8	37.0	39.8	40.1	+0.9
Viet Nam	0.0	0.0	0.0	4.6	4.2	4.0	43.4	42.7	42.8	47.9	46.9	46.8	-0.1

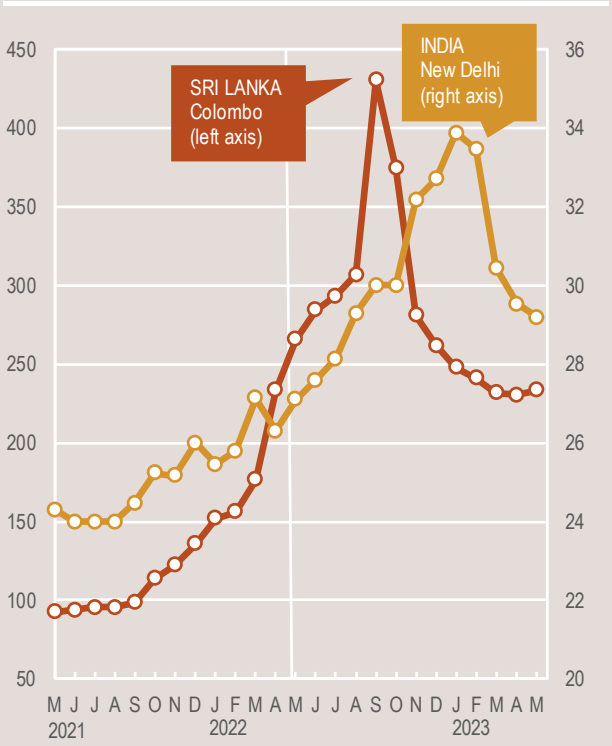
Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2018–2022 period.

restrictions since 13 May 2022. The total subregional import requirement of cereals in the 2023/24 is forecast at 165.3 million tonnes, 6 percent above the five-year average, on account of the strong demand for coarse grains to be used primarily for feed. Wheat imports are projected near the five-year average, and imports of rice in the 2023 calendar year are forecast at 16.9 million tonnes.

Record high food prices in Myanmar and Pakistan

In **Myanmar** and **Pakistan**, prices of most domestically grown cereals have increased since early 2022 and by May 2023 had reached record levels, reflecting generally tight market availability, high prices of agricultural inputs and high transport costs. Throughout **Pakistan,** prices of wheat flour, a key staple food, were between 100 and 270 percent higher year-on-year in May 2023. In **Myanmar,** domestic prices of long grain "Emata" rice, a widely consumed long grain variety, more than doubled from the already high levels of a year earlier. In both countries, prices of a wide range of imported food items, including cooking oils, dairy products and sugar, also increased since early 2022 and were at record or near-record

Wheat flour retail prices in selected Far East countries



Rice retail prices in selected Far East countries

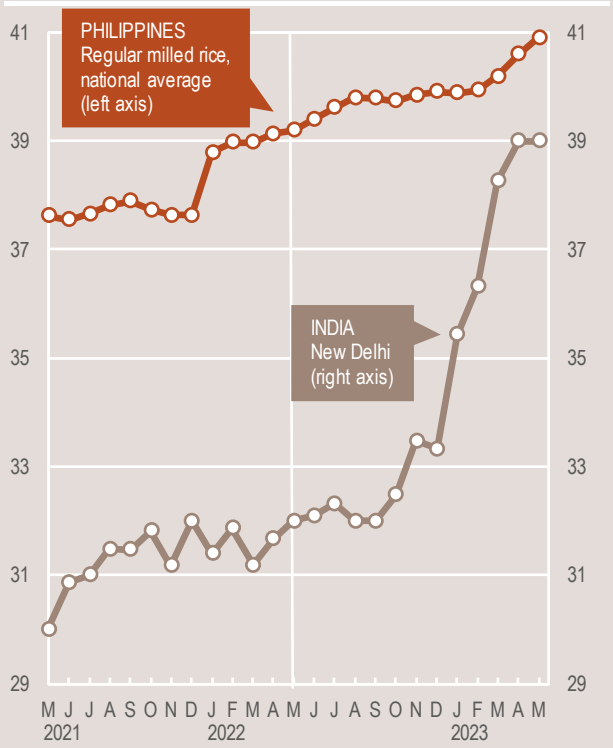


Table 12. Far East cereal production and anticipated trade in 2023/24

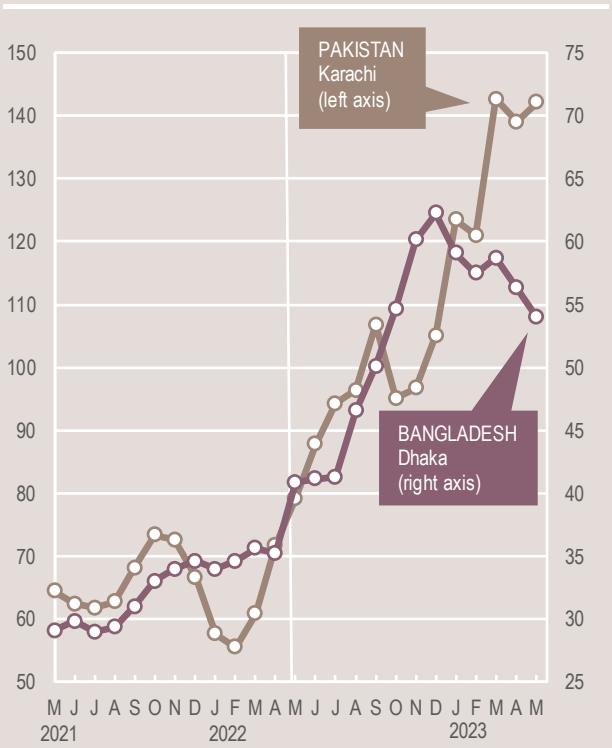
(thousand tonnes)

	5-year average (2018/19 to 2022/23)	2022/23	2023/24	Change: 2023/24 over 2022/23 (%)	Change: 2023/24 over 5-year average (%)
Coarse grains					
Exports	*5 453*	*6 605*	*6 255*	*-5.3*	*+14.7*
Imports	*83 336*	*84 565*	*90 051*	*+6.5*	*+8.1*
Production	*385 423*	*405 460*	*410 002*	*+1.1*	*+6.4*
Rice (millled)					
Exports	*41 294*	*46 155*	*48 865*	*+5.9*	*+18.3*
Imports	*15 297*	*16 922*	*17 070*	*+0.9*	*+11.6*
Production	*455 013*	*463 453*	*468 111*	*+1.0*	*+2.9*
Wheat					
Exports	*4 891*	*6 834*	*3 189*	*-53.3*	*-34.8*
Imports	*53 937*	*58 319*	*57 347*	*-1.7*	*+6.3*
Production	*270 322*	*276 734*	*279 834*	*+1.1*	*+3.5*

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

levels in May. In the remaining countries of the subregion, domestic prices of rice showed mixed trends between March and May 2023 and were close or above their year-earlier levels. In **Viet Nam** and **Thailand,** the main rice exporters, prices increased for the second consecutive month in May, driven by strong export demand. In **India, China (mainland)** and **Sri Lanka,** rice prices generally declined with the commercialization of the 2023 harvests. Whereas in **Bangladesh,** rice prices were generally stable and close to their year-earlier levels. Between March and May 2023, prices of wheat flour declined in **China (mainland), India** and **Bangladesh,** on supply pressure following the 2023 main season wheat harvest. In **Sri Lanka,** domestic wheat flour prices declined since October 2022, reflecting increased imported quantities and falling prices on the international market and a modest appreciation of the national currency since March.

Wheat flour retail prices in selected Far East countries



Large number of people remain food insecure in several countries

Economic downturns, shortfalls in cereal production and high food prices continue to have a significant negative impact on acute food security conditions in several countries of the subregion. In **Myanmar**, an increase in the intensity of the conflict, record high food prices and the effects of Cyclone Mocha, which hit the westerns areas in May 2023, has severely aggravated acute food insecurity. The cyclone triggered flash floods, causing losses of crops, livestock and food reserves, and affected about 3.4 million people. The worsening conflict has displaced 1.83 million people internally as of May 2023; most are almost entirely reliant on humanitarian aid. In **Pakistan,** according to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between April and October 2023 is estimated at 10.5 million. The difficult food security situation is mostly due to the lingering effects of devastating floods that occurred in July and August 2022, exacerbated by current high food prices and severe macroeconomic challenges. This number is also larger than the projection made in 2022, mainly reflecting an expanded coverage of the IPC analysis.

The difficult food security situation is mostly due to the lingering effects of devastating floods that occurred in July and August 2022, exacerbated by current high food price and severe macroeconomic challenges. In **the Democratic People's Republic of Korea,** the food security situation is expected to remain fragile, given the below-average output estimated in 2022. In **Sri Lanka,** pockets of food insecurity conditions persist in the Estate sector (tea production) and among households deriving their main incomes from social protection schemes such as Samurdhi and disability benefits.

NEAR EAST

Average 2023 cereal production forecast, despite dry start of the season

Harvesting of the 2023 winter cereal crops began in May and is expected to conclude in July in most countries. Spring cereals, planted between March and May, will be harvested from August.

Temporal and spatial rainfall distribution across the subregion was uneven between October 2022 and February 2023, with below-average cumulative precipitation amounts estimated in parts. Near-average rainfall amounts since March contributed to a partial recovery in crop conditions, particularly in the rainfed areas of northeast **Syrian Arab Republic,** northern **Iraq,** northwestern **Islamic Republic of Iran** and central **Türkiye**. In central and eastern parts of **Afghanistan,** close to average rainfall amounts in April and May 2023 also helped to improve crop conditions. However, elsewhere in **Afghanistan** crops were affected by dry weather conditions and there are concerns about the availability of irrigation water from melted snow for summer crops following insufficient precipitation during the winter months.

In **Afghanistan,** total 2023 cereal production is currently forecast at a below-average level of 4.85 million tonnes. This includes 4 million tonnes of wheat, about 4 percent below the average due to the effects of dry weather conditions. However, the anticipated output is still 5 percent above the 2022 drought-stricken harvest, in part reflecting an increase in the area planted as land was directed away from the banned poppy cultivation. In **Iraq,** the 2023 cereal harvest is expected to reach 4.2 million tonnes (including 3 million tonnes of wheat), about 30 percent above the drought-stricken harvest in 2022, albeit 20 percent below the average. In **the Syrian Arab Republic**, the 2023 cereal output is forecast at 3.3 million tonnes, more than double the previous year's outturn, when yields were significantly affected by dry weather conditions, and slightly above the five-year average. Cereal production in **the Islamic Republic of Iran** is expected at a near-average level of 20.6 million tonnes. In **Türkiye,** the first official forecast puts the 2023 cereal production at 37.4 million tonnes, over 7 percent above the five-year average, but a slight decline compared to 2022 possibly owing to damages induced by the February 2023 earthquake.

In countries experiencing difficult socioeconomic circumstances due to conflicts or economic crises, including **Afghanistan, Lebanon, the Syrian Arab Republic** and **Yemen,** farmers' access to inputs remains constrained by the lack of liquidity and high prices of generally imported inputs, factors that are curtailing productive capacities and yield potentials.

The total subregional cereal production in 2023 is forecast at 72 million tonnes, close to previous year's average harvest.

Near-average cereal import requirement forecast

Subregional cereal import requirements in the 2023/24 (July/June) marketing year are forecast at 78 million tonnes, about 2 percent above the average. The wheat import requirement is forecast at 35.8 million tonnes, about 8 percent above the average, reflecting rising demand due to population growth and efforts to rebuild stocks in some countries.

While some countries in the subregion used to source large quantities of cereals from Ukraine and the Russian Federation, the concerns about the impact of the war on domestic food availability in 2022 induced them to diversify import sources, albeit at a higher price. Despite easing of global cereal prices, the national import bills are still increasing, reflecting currency weakness. However, the impact on domestic balance of payments is expected to be less in oil exporting countries, such as Iraq, given the prevailing elevated prices of hydrocarbons.

Large number of people remain acutely food insecure

Lingering conflicts, elevated international commodity prices, economic downturns and reduced livelihood opportunities continue to have a significant impact on acute food security conditions in many countries of the subregion.

In **Afghanistan,** according to the latest Integrated Food Security Phase Classification (IPC) analysis, approximately 15.3 million people (35 percent of the population analysed) are projected to face severe acute food insecurity (IPC Phase 3 [Crisis] and above) between May and

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Near East	43.2	41.4	44.0	22.1	23.8	23.6	5.6	5.1	4.4	70.9	70.3	72.0	+2.4
Afghanistan	4.3	3.8	4.0	0.3	0.3	0.3	0.6	0.6	0.6	5.2	4.7	4.9	+3.1
Iran (Islamic Republic of)	13.2	13.0	13.5	3.8	4.1	4.1	3.7	3.5	3.0	20.8	20.6	20.6	-0.0
Iraq	4.0	2.8	3.0	1.1	0.4	1.2	0.0	0.0	0.0	5.4	3.2	4.2	+30.5
Türkiye	19.4	19.8	20.5	14.9	17.7	16.0	1.0	1.0	0.9	35.2	38.4	37.4	-2.8

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

October 2023, including about 2.8 million people in IPC Phase 4 (Emergency).

In **Yemen,** nearly 17 million people, over half of the population, were 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 about 4.3 million people who are internally displaced as a result of the conflict. In 2023, a partial IPC analysis was conducted in areas controlled by the Government of Yemen, and indicated that approximately 25 percent of the population in acute food insecurity are located in these areas, illustrating that the situation remains dire.

In **the Syrian Arab Republic,** based on the World Food Programme's (WFP) Consolidated Approach for Reporting Indicators (CARI), about 12.1 million people were assessed to be acutely food insecure (55 percent of the total population), between August and October 2022.

In **Lebanon,** the IPC Acute Food Insecurity Analysis projected that, between January and April 2023, 2.3 million people (42 percent of the population analysed), including 1.5 million Lebanese residents and 800 000 Syrian refugees, to face IPC Phase 3 (Crisis) or worse conditions, including 354 000 in IPC Phase 4 (Emergency). The situation is mainly due to the multifaceted crisis that the country is facing.

SOUTH CAUCASUS AND CENTRAL ASIA

Wheat production forecast above average in 2023

Harvesting of the 2023 winter cereal crops started in June and it is expected to conclude by August in Central Asian countries, while it usually takes place between July and September in Caucasian countries. Planting of the 2023 spring cereals is virtually complete and harvesting is expected to take place between August and September.

In **Kazakhstan,** the spring wheat crop, which accounts for about 95 percent of the country's annual domestic wheat output, was sown by May on about 12.8 million hectares, 6 percent above the five-year average level. Weather conditions have been favourable for emergence and early crop development of the spring wheat, mainly due to an even temporal and spatial distribution of rainfall. In total, domestic wheat production (including the minor winter crop) is preliminarily forecast at an above-average level of 16 million tonnes.

The 2023 subregional cereal output is forecast at an above-average level of 36 million tonnes, including 27 million tonnes of wheat. In addition to Kazakhstan, above-average wheat outputs are forecast in **Azerbaijan**, **Georgia**, **Kyrgyzstan** and **Uzbekistan**. The 2023 aggregate barley output is forecast at 5 million tonnes, 7 percent below the five-year average mainly due to reduced plantings in Kazakhstan, while the subregion's maize output is forecast at a near-average level of 3 million tonnes.

Near-average cereal import requirements forecast in 2023/24

The subregional aggregate cereal import requirements are estimated at a near-average level of about 9 million tonnes in the 2023/24 marketing year (July/June). Total cereal exports from **Kazakhstan** are forecast at 10 million tonnes, slightly above the average level. Wheat exports are anticipated at an above-average level of 9.8 million tonnes, supported by favourable production prospects for the 2023 crop and stable demand from importing countries. In April 2023, the Ministry of Agriculture of Kazakhstan announced a six-month ban on the import of wheat by road into the national territory, with the aim to support domestic farmers and to stabilize the price of locally produced wheat, which is facing strong competition from cheaper Russian grains.

Table 14. South Caucasus and Central Asia cereal production

(million tonnes)

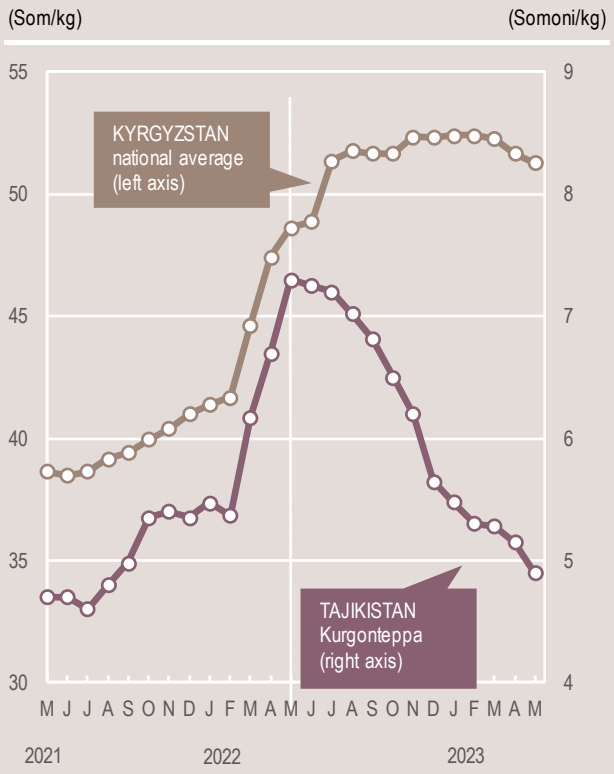
	Wheat			Coarse grains			Total cereals[1]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
South Caucasus and Central Asia	24.3	27.2	26.8	8.8	8.6	8.8	34.1	36.8	36.7	-0.2
Armenia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	-1.4
Azerbaijan	2.0	1.9	2.0	1.3	1.3	1.4	3.3	3.2	3.4	+6.5
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	+5.8
Kazakhstan	13.6	16.4	16.0	4.8	4.6	4.6	18.9	21.5	21.2	-1.4
Kyrgyzstan	0.6	0.6	0.6	1.1	1.1	1.1	1.7	1.8	1.8	+0.7
Tajikistan	0.8	0.8	0.8	0.4	0.4	0.4	1.3	1.3	1.3	+0.6
Turkmenistan	1.2	1.1	1.1	0.1	0.1	0.1	1.3	1.2	1.2	-0.1
Uzbekistan	5.9	6.1	6.0	0.7	0.8	0.8	7.0	7.2	7.2	-0.5

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

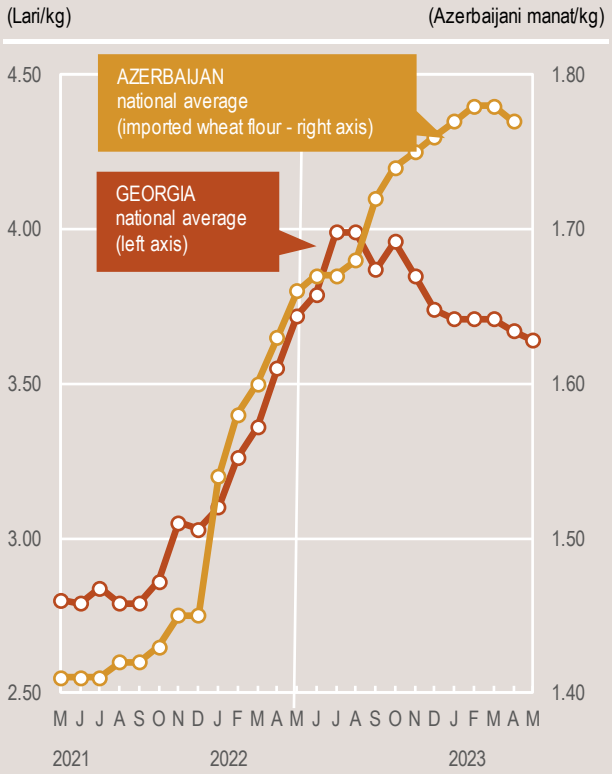
Domestic prices of wheat flour remained stable

In **Kazakhstan**, average retail prices of wheat flour remained stable from February to May 2023, but increased by about 20 percent year-on-year due to the strong export demand. Domestic retail prices of wheat flour decreased slightly in **Armenia**, **Georgia**, **Kyrgyzstan** and **Tajikistan** from February to May 2023. In all countries, prices in May were well above their levels a year-earlier.

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



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



REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

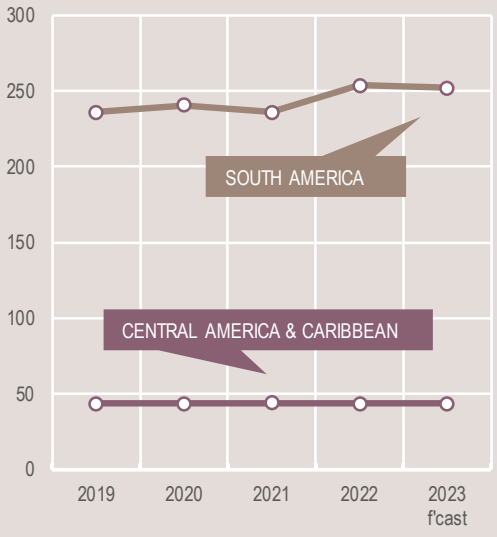
** See Terminology (*page 7*).
A dispute exists between the governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 2*. Cited 7 July 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2022.

Production Overview

Total cereal production in Latin America and the Caribbean is forecast at an above-average level of 295.7 million tonnes (rice in paddy terms) in 2023. This large output principally reflects a record maize outturn forecast in Brazil, underpinned by robust demand that drove up the maize acreage and generally conducive weather conditions that are supporting good yield expectations. Outputs elsewhere in South America are foreseen to remain unchanged or fall due to prolonged dry spells in 2023, especially in Argentina where drought conditions are seen to cut total cereal production in 2023 by 18 percent compared to the five-year average. In Central America, aggregate cereal production is pegged at an average level in 2023, however, there are serious concerns in Haiti where rainfall shortages in 2023 and continued insecurity are undermining production prospects.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Above-average wheat yields boost 2023 production prospects

In **Mexico,** virtually the only wheat producer in the subregion, harvesting of the 2023 main winter crop, which accounts for almost all of the annual national output, is nearing completion. In aggregate, total wheat production, including the minor spring crop, is anticipated at an above-average level of 3.4 million tonnes, mainly due to excellent yield prospects, supported by favourable weather conditions. Official estimates point to an average area planted with wheat.

Maize output in 2023 forecast at a slightly below-average level

In **Mexico**, harvesting of the 2023 minor season maize crop is underway and despite large sowings, production is expected to be slightly below average, on account of low yields. The main season maize crops will be planted by July, and the total area sown is officially forecast at a level close to the five-year average. Weather forecasts indicate average to above-average rainfall amounts in the July–September period over the main producing central areas, boosting yield prospects of the mostly rainfed main crops. Aggregating all seasons' harvests, Mexico's maize output is forecast at a near-average level of 26.9 million tonnes in 2023.

Elsewhere in the subregion, the 2023 main season maize crop is currently at germination and early development stages. Reflecting dry and hot weather conditions between April, the start of the main planting period, and mid-June, a cutback in the area sown is foreseen. Consequently, prospects for the main season production point to at a slightly below-average level in 2023. To improve productive capacities of smallholder farmers, amid high domestic prices of inputs and drought risks associated with the prevailing El Niño event, the governments of **Guatemala, El Salvador, Honduras** and **Nicaragua** are continuing to distribute free seeds and fertilizers. According to weather forecasts, below-average precipitation amounts are likely to persist in the third quarter of 2023 over northern **Guatemala**, eastern **Honduras** and most of **Nicaragua**, which would likely curb yields. The 2023 Atlantic hurricane season is forecast to be near average, with high probabilities of one to four major hurricanes (above category 3) developing between June and November, a further factor that could impinge on crop production in 2023.

In **Haiti,** harvesting of the 2023 main season crops of maize and beans will start in July, one month later than usual due to the late onset of seasonal rains that delayed sowing operations. Maize production from the main season crop is forecast at a below-average level, owing to reduced plantings on account of inadequate soil moisture. Reflecting a persistently low supply of agricultural inputs and generally below-average rainfall amounts between March and May, yields are also likely to be low, further weighing on the production outlook in 2023. Weather forecasts indicate above-average rainfall amounts and high temperatures in the July–September period, which could foster some improvements in crop conditions but also increase the risk of pest outbreaks. In **the Dominican Republic,** harvesting of the 2023 main season paddy crop was completed in May and an average production is expected. Below-average rainfall amounts between April and May curbed sowings of the minor season cereal crops, to be harvested from August, which is undermining production expectations.

Cereal imports expected at average levels in 2022/23

During the last decade, cereal imports have been steadily rising in the subregion, supported by growing demand for yellow maize by the feed industry and for wheat for human consumption. The 2022/23 marketing year (September/August) will be a notable exception, with total imports expected to decline year-on-year, which in part reflects the impact of high international cereal prices.

Prices of beans and white maize remained up from a year earlier

As of May 2023, wholesale prices of beans were above their year-earlier values, with year-on-year differences ranging from 7 percent in **Guatemala** to 40 percent in **Nicaragua.** These higher prices reflect low outputs in 2022 as well as elevated prices of agricultural inputs, fuel and labour that raised production costs. In all countries, prices of white maize were also higher

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Central America and the Caribbean	3.2	3.6	3.4	37.5	37.2	37.5	2.8	2.7	2.7	43.6	43.6	43.5	-0.0
El Salvador	0.0	0.0	0.0	0.9	0.9	0.9	0.0	0.0	0.0	0.9	1.0	0.9	-2.7
Guatemala	0.0	0.0	0.0	2.0	2.0	1.9	0.0	0.0	0.0	2.0	2.0	2.0	-2.6
Honduras	0.0	0.0	0.0	0.7	0.7	0.6	0.0	0.0	0.0	0.7	0.7	0.7	-6.0
Mexico	3.2	3.6	3.4	32.8	32.4	32.9	0.3	0.2	0.2	36.3	36.3	36.5	+0.6
Nicaragua	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.4	0.8	0.9	0.9	-1.0

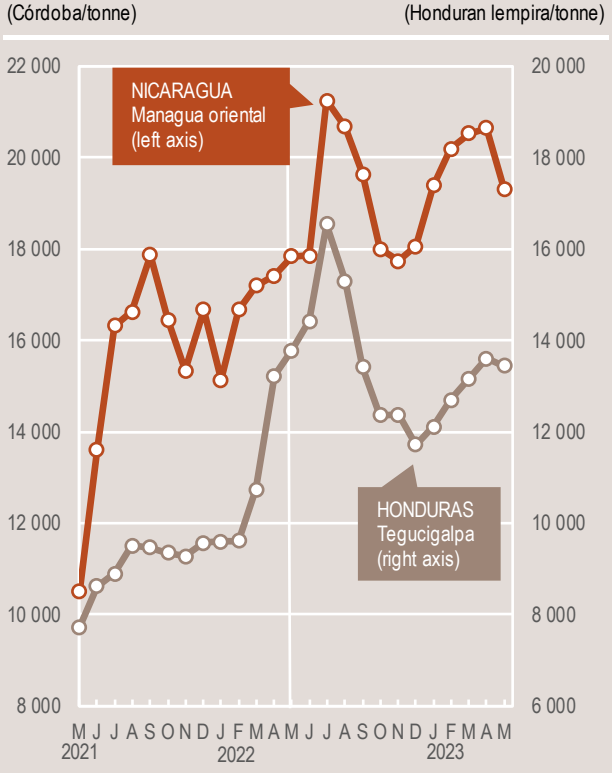
Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2018–2022 period.

year-on-year in May, with the exception of **Honduras,** where prices were near their year-earlier levels. Between March and May, prices declined in **El Salvador** on supply pressure, reflecting large import quantities in the first four months of the year. In **Guatemala,** prices declined in April and May, amid the harvest period in the northern region that boosted market supplies. Maize prices in **Mexico** rose in May, despite the ongoing 2023 minor harvest, due to concerns over the impact of current soil moisture deficits in the western region on the ongoing 2023 main plantings. In **Haiti,** retail prices of domestically produced maize meal and black beans strengthened in the March–May period, when normal seasonal trends were intensified by several factors, including fuel shortages, worsening insecurity that hindered supply routes and concerns about the 2023 main crops. In April 2023, prices of staple grains remained at elevated levels, at least 50 percent higher year-on-year.

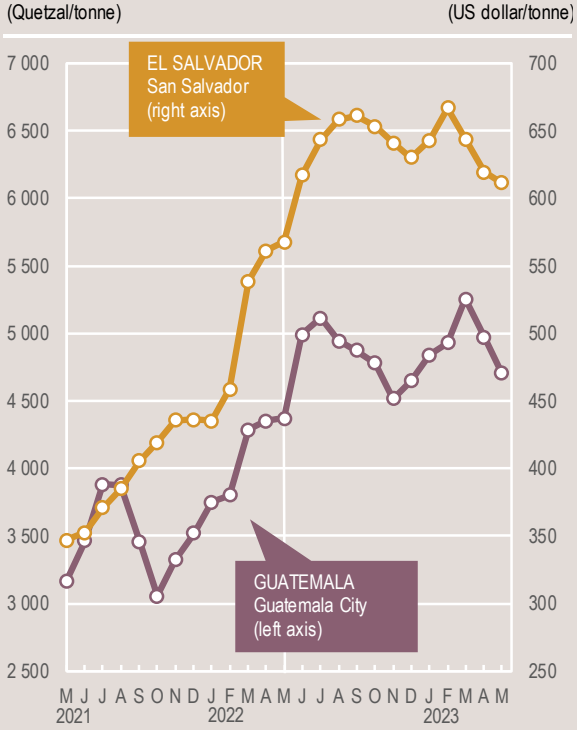
Persistently high food and transport costs affect food insecurity

According to the latest IPC analyses, the number of acutely food insecure people requiring urgent humanitarian assistance during the 2023 lean season (June–August) is estimated at 4.3 million in **Guatemala** and 2.4 million in **Honduras,** slightly lower than the same period in 2022. In **Haiti,** a record-high 4.9 million people, representing almost half of the analysed population, were estimated to be food insecure in the March–June 2023 period. Severe macroeconomic difficulties and the decline in domestic food production resulted in a dire food security situation, with heightened insecurity constraining access to essential services, including markets, causing large population displacements and hampering the delivery of humanitarian assistance. According to the first IPC analysis carried out in the Dominican Republic, about 1.2 million people are estimated to face acute food insecurity in the March–June 2023 period, accounting for over 10 percent of analysed population. Throughout the subregion, the main drivers of acute food insecurity are elevated prices of food and fuel, which constrain agricultural activities and limit access to food.

Wholesale white maize prices in selected Central America countries



Wholesale white maize prices in selected Central America countries



SOUTH AMERICA

Above-average maize production forecast in 2023

Harvesting of the 2023 main season maize crop is underway in most countries and the subregional maize output is forecast at 180 million tonnes in 2023, 12 percent above the five-year average. This reflects expectations of a bumper output in Brazil that are counteracting prospects of production downturns in most other countries of the subregion. In **Brazil,** where maize sowings have been increasing sharply since 2019, underpinned by strong domestic and export demand, the upward trend continued in 2023 and an all-time high acreage is estimated in 2023. Together with expectations of above-average yields, the 2023 total maize production is officially forecast at record-high 125.7 million tonnes, 30 percent above the five-year average. Despite above-average plantings in **Argentina,** maize production is officially forecast at 41 million tonnes, more than 25 percent below the five-year average, due to drought conditions between September 2022 and February 2023 that severely affected yields. Similarly, in **Uruguay,** prolonged dry spells resulted in a below-average maize output in 2023, with the crop harvested by May. In **Paraguay,** the main season harvest is ongoing and satellite imagery indicates favourable vegetation conditions in cropland areas. However, a below-average production is anticipated due to a price-driven contraction in plantings. Maize production is also expected to be below average in **Bolivia (Plurinational State of)** and **Chile,** where unfavourable weather conditions are impairing yield prospects. Furthermore, in Chile, maize plantings were estimated at a near-record low level reflecting the crops low profitability, a further factor that drove the below-average outturn. By contrast, in **Colombia** and **Peru,** the first season maize crop, harvested in the first half of 2023 and accounting for nearly half of the annual production, is expected at above-average levels, supported by an expansion of plantings and favourable weather conditions. However, in **Colombia**, below-average precipitation amounts are forecast in northern and central areas in the July–September 2023, which could affect yields of the main crop at grain-filling and maturing stages as well as planting operations of the 2024 minor crop. An above-average maize output is expected in **Ecuador** due to excellent yields.

Harvesting of the 2023 paddy crop recently concluded in southern parts of the subregion and the regional output is estimated at a below-average level. In **Brazil,** production is officially estimated at a below-average level of 10 million tonnes, reflecting a 15-percent reduction in sowings compared to the five-year average, as farmers shifted to plant more remunerative soybean or maize crops. By contrast, an above-average output is estimated in **Uruguay,** reflecting high yields. In **Colombia** and **Peru,** where the 2023 first harvest was recently completed, the seasonal outturn is expected to exceed the five-year average on account of above-average yields. In **Colombia,** sowings increased by more than 15 percent year-on-year to an average level, prompted by high domestic prices of rice.

Uncertain production prospects for 2023 wheat crop

In **Argentina,** the leading producer of the subregion, wheat plantings are ongoing but at a slow pace due to soil moisture deficits and, despite expectations of a slight increase in sowings, the 2023 wheat acreage is officially forecast at a below-average level of 6.1 million hectares. In **Brazil,** plantings were recently completed and official estimates point to record high wheat acreage, nearly 40 percent above the five-year average. The high level was driven by strong demand and a delay in the soybean harvest that compelled farmers to plant wheat instead of maize, as the optimal planting window for maize closed by March. In **Paraguay,** planting operations are nearing completion and the area sown is expected to be slightly below average. In **Uruguay,** despite lower year-on-year prices, the area planted with wheat is anticipated to remain at a high level for the second consecutive year, as farmers opted to plant wheat rather than rapeseed due to the impact of soil moisture deficits that shortened the growing season for rapeseed. Overall production prospects are uncertain, due to forecasts of mixed weather conditions. Expectations of persistent dry weather conditions in the July–September period in **Argentina** raise concerns about crop germination and development, while predictions of above-average rainfall amounts in the October–December period over key producing areas in southern **Brazil**, southeastern **Paraguay** and **Uruguay** could hamper harvesting operations.

Table 16. South America cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
South America	29.1	27.3	31.8	180.5	202.3	196.6	24.8	24.2	23.7	234.4	253.8	252.1	-0.7
Argentina	18.3	12.6	18.0	63.4	67.2	48.7	1.3	1.2	1.0	82.9	81.0	67.6	-16.6
Brazil	7.0	10.6	9.8	100.5	117.8	131.7	11.3	10.8	10.0	118.8	139.1	151.5	+8.9
Chile	1.2	1.1	1.2	1.6	1.3	1.3	0.2	0.1	0.1	3.0	2.5	2.6	+3.2
Colombia	0.0	0.0	0.0	1.4	1.5	1.6	2.8	2.6	2.8	4.2	4.2	4.4	+4.9
Peru	0.2	0.2	0.2	1.8	1.9	1.8	3.4	3.5	3.4	5.5	5.6	5.4	-2.6

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

Despite a year-on-year decline, cereal exports forecast above average in 2023/24

Aggregate cereal exports in the 2023/24 marketing year (March/February) are forecast at an above-average level of 100 million tonnes, despite a year-on-year decline. Subregional exports of maize, the major exportable grain, are anticipated to decrease by 15 percent in 2023/24 compared to the all-time high in 2022/23 due to the significant decline in **Argentina's** output. However, subregional maize exports are still anticipated at an above-average level of 75 million tonnes, sustained by excellent production prospects in **Brazil** and consequently foreseen large export quantities. Exports of wheat in 2022/23 (December/November) are forecast 30 percent below the five-year average, owing to drought-induced production shortfalls in Argentina.

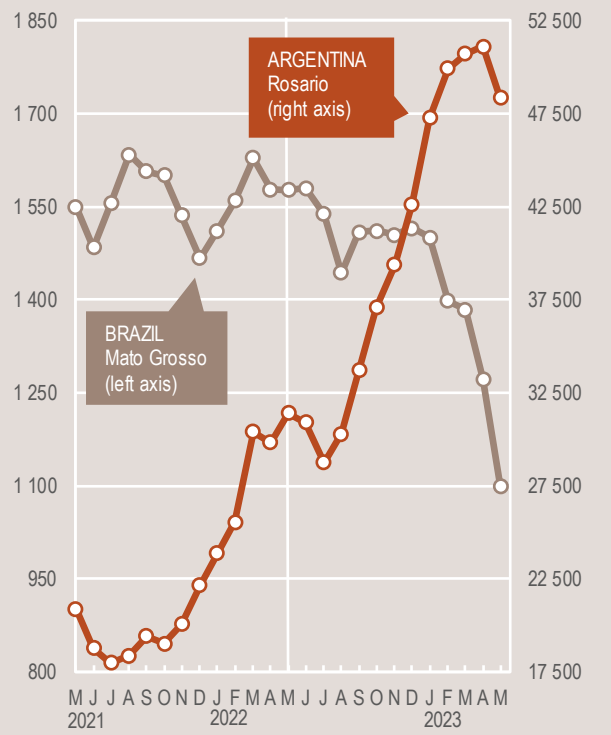
Prices of yellow maize declined seasonally in most countries

Prices of yellow maize declined seasonally in May 2023 in **Argentina** and **Uruguay,** but remained well above their year-earlier values due to sustained increases in preceding months driven by the drought affected 2023 production. Between March and May, maize prices decreased in **Brazil** due to ample supplies and expectations of a record main harvest. During this period, prices also declined in **Bolivia (Plurinational State of)** and **Chile**, while they were broadly stable in **Colombia** and **Ecuador**.

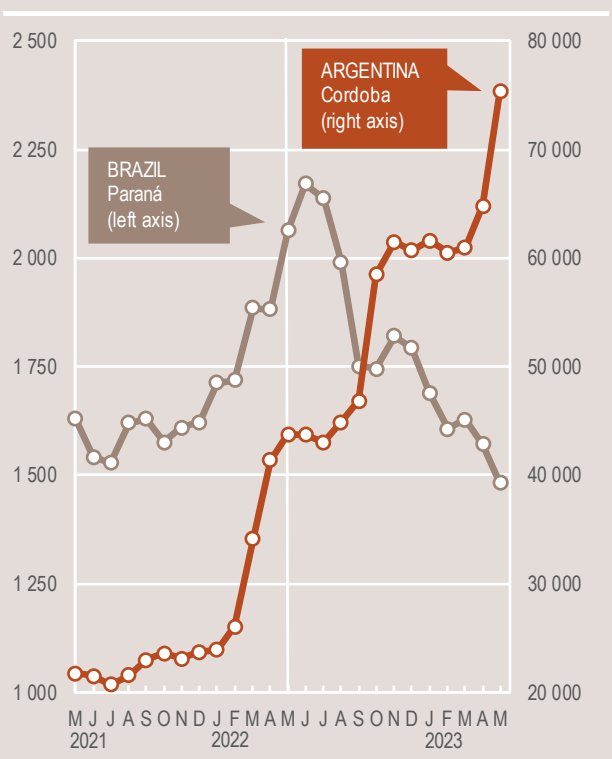
Regarding rice, prices increased in the March–May period in **Brazil, Colombia** and **Uruguay,** despite improved market supplies from the 2023 harvests. Tight supplies due to production downturns in **Brazil** and **Colombia** provided upward pressure, while the price increase in **Uruguay** was instigated by strong export demand during the first four months of 2023. In **Bolivia (Plurinational State of)** and **Ecuador,** prices of rice weakened during the same period in line with seasonal trends.

Domestic prices of wheat rose in **Argentina** in April and May, driven by strong demand from the domestic milling industry, and were well above their year-earlier levels reflecting the impact of the drought-reduced 2022 output. By contrast, in **Brazil,** wheat prices declined

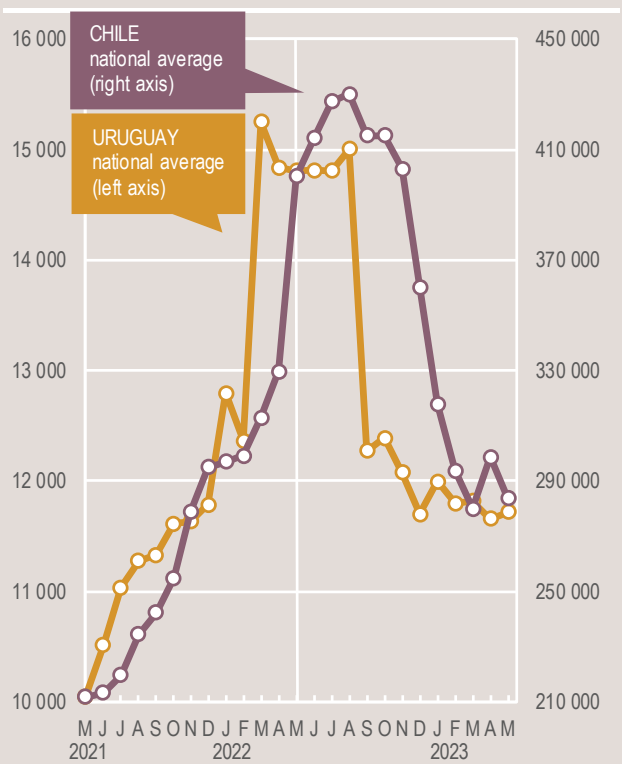
Wholesale maize prices in selected countries in South America



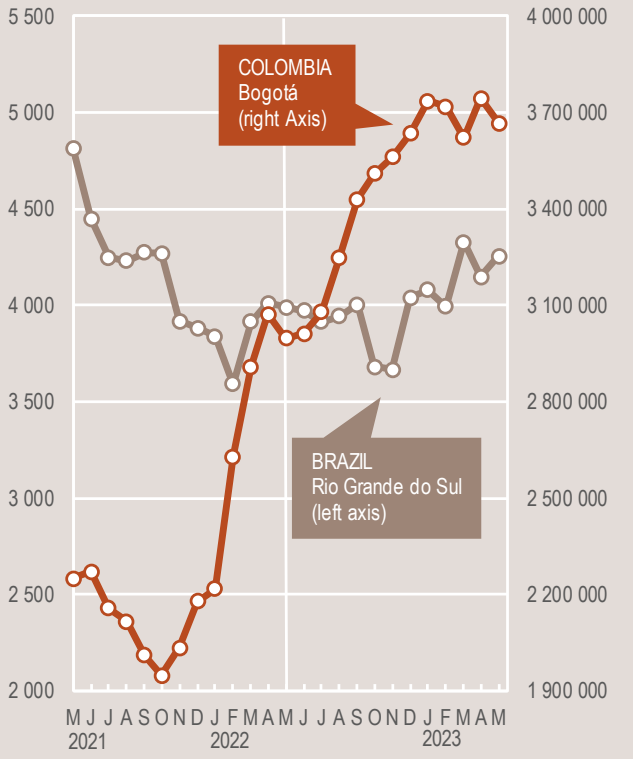
Wholesale wheat prices in selected countries in South America



Wholesale wheat prices in selected countries in South America



Wholesale rice prices in selected countries in South America



between March and May driven by weak domestic demand, amid ample national supplies. During this period, prices also weakened in **Chile** and **Uruguay.** In **Brazil**, **Chile** and **Uruguay**, prices in May were at least 20 percent lower than their levels a year earlier, when prices were at elevated levels. In importing countries of **Bolivia (Plurinational State of), Colombia** and **Ecuador,** wheat flour prices remained generally up from a year earlier.

Food assistance needs increase among Venezuelan refugees and migrants in 2023

As of May 2023, the number of refugees and migrants from **the Venezuela (Bolivarian Republic of)** was estimated at 7.3 million people, as a result of the severe and prolonged macroeconomic crisis in the country. The largest groups of Venezuelans are located in **Colombia** (2.48 million), **Peru** (1.52 million), **Ecuador** (0.5 million), **Brazil** (0.45 million) and **Chile** (0.44 million). Despite some recovery in economic growth since 2021, outflows of refugees and migrants continued in the first five months of 2023. The Regional Refugee and Migrant Response Plan 2023–2024 estimated that 3.62 million Venezuelan refugees and migrants (in-destination) are in need of food assistance in 2023, slightly up from the 3.57 million people in 2022. In addition to the limited income-earning opportunities, elevated food prices are further stressing food security conditions of Venezuelan refugees and migrants. The UN Office for the Coordination of Humanitarian Affairs (OCHA) Humanitarian Response Plan has targeted food and livelihoods assistance for 2 million people in **the Venezuela (Bolivarian Republic of)** and for 0.5 million people in **Colombia** in 2023.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of June 2023
Territories/boundaries**

NORTH AMERICA

Canada
Maize: Planting
Small grains: Vegetative

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

EUROPE

Northern Europe
Small grains: Reproductive

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

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

OCEANIA

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

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 2.* Cited 7 July 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

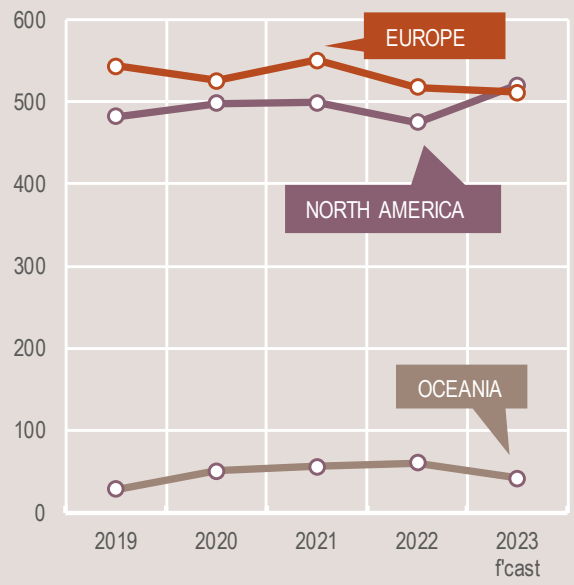
Production Overview

In the United States of America, total wheat production in 2023 is forecast to remain below the five-year average, as prolonged drought conditions contain yield prospects, offsetting the positive impact of an increase in plantings, that reached the highest level since 2015. Maize production is pegged at an above-average level in 2023, however, there are some concerns regarding drier conditions in the main producing states that could curb yields. In Canada, a substantial wheat output is forecast in 2023, driven by an expansion in plantings.

In the European Union, total wheat production is forecast at an above-average level in 2023, largely reflecting an upturn in yields in most countries, except in the Iberian Peninsula, where persistent rainfall deficits curtailed yield prospects. Maize production is forecast to increase in 2023, on account of an expected rise in yields compared to the drought-affected levels of 2022.

In Oceania, following three consecutive bumper wheat outputs in Australia, production is seen to fall sharply in 2023, owing to expectations of reduced rainfall amounts that are undermining yield expectations.

Cereal production
(million tonnes)



NORTH AMERICA

Persistent drought lowers 2023 wheat yields in the United States of America

In **the United States of America,** the aggregate 2023 production of winter and spring wheat crops is forecast at 45.3 million tonnes, below the previous five-year average. Despite an upturn in wheat plantings to the highest level since 2015, mostly related to the winter crops and driven by high prices in 2022, drought conditions have affected large swathes of wheat cropland for a third successive year. The widespread dryness has curtailed 2023 yield prospects and the national average yield in 2023 is forecast below the drought-affected 2022 level.

Planting of the 2023 summer maize crop was completed in early June and the total acreage is estimated to have increased by nearly 10 percent compared to the five-year average, reflecting good profit prospects amid easing input prices. In some of the main producing midwestern states, rainfall amounts in June have been below average and, along with high temperatures, have caused some stress to maize crops. Drought conditions are forecast to persist in these areas until September, with the potential to curtail yields. Total maize production, as of June, is pegged at 388 million tonnes, well above the five-year average.

In **Canada,** the 2023 main spring wheat crop was planted by June and conditions were mostly favourable, except in western Alberta Province, a key producing area, where rainfall deficits in the spring resulted in soil moisture deficits at planting time. However, the 2023 wheat area is estimated to increase by about 10 percent compared to the five-year average, driven by remunerative crop prices. Based on the expected upturn in plantings and overall good yield prospects, total wheat production is forecast at a well above-average level of 35.8 million tonnes.

EUROPE

Wheat production up in 2023 in the European Union

In the **European Union,** harvesting of the 2023 winter wheat crop is underway and the total wheat output, including the minor spring crop harvested later in the year, is forecast at 140 million tonnes, 6 percent higher than the previous three-year average. The expected increase principally reflects an upturn in yields, with generally beneficial weather conditions across much of the European Union, apart from the Iberian Peninsula, where persistent dryness has affected vegetation conditions in cropland areas.

Production of maize, with the crop planted in May and June, is forecast at 64.4 million tonnes in 2023, on par with the three-year average and higher than the drought-affected 2022 crop. The anticipated year-on-year increase is driven by better yield

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
North America	80.0	78.7	81.1	401.8	389.5	430.5	9.0	7.3	8.7	490.8	475.5	520.3	+9.4
Canada	31.3	33.8	35.8	28.1	30.6	28.1	0.0	0.0	0.0	59.5	64.5	63.9	-0.9
United States of America	48.7	44.9	45.3	373.7	358.8	402.4	9.0	7.3	8.7	431.3	411.0	456.4	+11.1
Europe	262.5	280.4	263.9	261.1	234.7	244.3	3.8	3.0	3.1	527.5	518.1	511.3	-1.3
Belarus	2.4	2.5	2.5	4.8	5.3	5.1	0.0	0.0	0.0	7.2	7.8	7.6	-2.0
European Union[I]	138.4	133.9	140.0	153.7	133.9	147.6	2.7	2.1	2.0	294.9	269.9	289.7	+7.4
Russian Federation[II]	82.2	102.7	82.8	41.1	43.1	41.6	1.1	0.9	1.1	124.4	146.7	125.4	-14.5
Serbia	3.0	3.1	3.0	7.2	5.1	7.3	0.0	0.0	0.0	10.2	8.3	10.3	+24.9
Ukraine[III]	26.0	20.2	18.5	43.7	34.4	29.2	0.0	0.0	0.0	69.8	54.6	47.8	-12.5
Oceania	28.4	40.1	26.6	16.6	19.7	14.8	0.4	0.7	0.5	45.3	60.5	42.0	-30.6
Australia	28.0	39.7	26.2	15.9	19.1	14.2	0.4	0.7	0.5	44.3	59.4	40.9	-31.2

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

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

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

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

prospects relative to 2022, which are seen to offset the impact of a pullback in maize sowings. However, there are some concerns about maize crops in the Iberian Peninsula due to long-term dryness, as well as in the Baltic Sea countries, parts of **Germany** and **Ireland**, due to recent soil moisture deficits.

Cereal production forecast to drop in the Russian Federation and Ukraine in 2023

Harvesting of the 2023 winter cereal crops in eastern countries of Europe, which account for the bulk of the aggregate cereal output, started in July, while planting of the spring crops was completed in June. In total, cereal production among **the Russian Federation**, **the Republic of Moldova** and are forecast below the five-year average, resting on expected production downturns of maize and wheat crops.

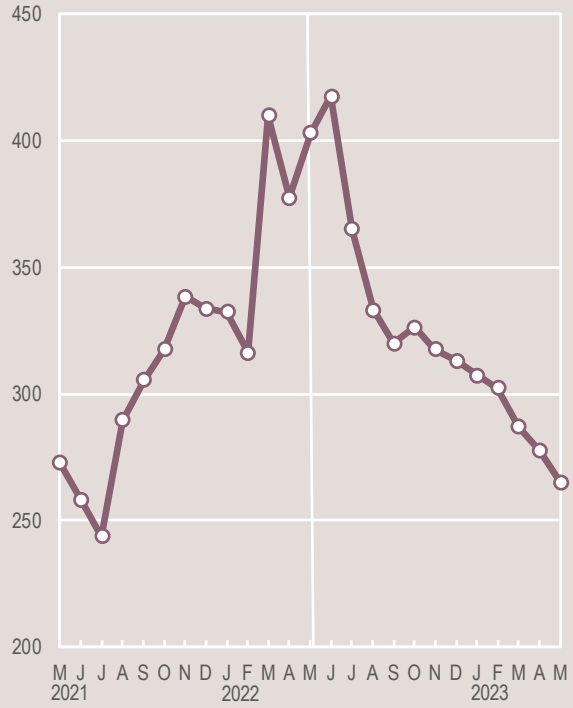
In **Ukraine**, 2023 wheat production is forecast at 18.5 million tonnes, 30 percent below the five-year average. The expected steep decline results from the impact of the war, which, among many other factors, has inhibited physical access to fields, reflected in a near-30 percent year-on-year decline in 2023 winter wheat crop sowings. A lack of liquidity and in some areas disruptions to input markets have also severely limited farmers' ability to procure inputs, containing 2023 yield prospects despite generally conducive weather. For analogous reasons, the 2023 maize output, to be harvested from September, is forecast at 22.5 million tonnes, almost 35 percent below the average. In total, the 2023 domestic cereal output is expected at a well below-average level of 46.2 million tonnes.

In **the Russian Federation**, the aggregate 2023 wheat output is forecast to decline to a near-average level of 82.8 million tonnes, following the 2022 all-time high, reflecting a contraction in the wheat planted area due to excessive wet conditions in late 2022 and softer crop prices. Total cereal production in the Russian Federation, including above-average forecasts for maize and barley, is pegged at about 125 million tonnes in 2023, comparable to the five-year average. In **the Republic of Moldova,** the preliminary forecast for 2023 production stands at a near-average level of 3 million tonnes. Although weather conditions have been mixed during the growing season, as of early June, satellite images depicted generally good vegetation conditions in the main wheat growing areas and consequently wheat production is expected at a near-average level of 1.1 million tonnes. In **Belarus,** the 2023 total cereal output is forecast at 7.6 million tonnes, close to the five-year average.

Lower cereal exports forecast from the Russian Federation and Ukraine

Uncertain prospects for maritime transport links, conflict-induced damages to transport and storage infrastructure continue to limit exports of grains from Ukraine and, in total cereal exports are forecast to be about 10 percent below the five-year average in 2023/24. At the commodity level, exports of maize and wheat from Ukraine are forecast at 23 million and 10 million tonnes, respectively, the lowest levels in the last eight years. In the Russian Federation, total cereal exports in 2023/24 are forecast at an above-average level of 54 million tonnes, which includes 45 million tonnes of wheat.

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



Export prices of wheat below year-earlier levels in the Russian Federation

In **the Russian Federation**, export price of milling wheat decreased by over 12 percent between February and May 2023. However, the base price for calculating the wheat export duty in **the Russian Federation** was raised in June to RUB 17 000, up from RUB 15 000, and consequently the export duty on wheat is set to drop.

In **Belarus** and **the Republic of Moldova**, the national average retail price of wheat flour increased slightly between February and May 2023.

About 17.6 million people in need of humanitarian assistance in Ukraine

Ukraine continues to be a significant supplier of food commodities for the world. However, according to the 2023 Humanitarian Needs Overview, about 17.6 million people are estimated to need multisectoral humanitarian assistance in 2023, including over 11 million in need of food security and livelihood interventions. As of late May 2023, slightly over 5 million people were estimated to be displaced in the country (International Organization for Migration [IOM]), while the presence of about 6 million Ukrainian refugees was recorded in European countries as of mid-June 2023 (United Nations High Commissioner for Refugees [UNHCR]).

OCEANIA

Forecasts of reduced rains dampen 2023 production prospects in Australia

In **Australia,** planting of the 2023 wheat crop, the main winter cereal, is ongoing. Initial forecasts put the 2023 wheat production at a below-average level of 26 million tonnes. The unfavourable production prospects are largely due to an expected downturn in yields, as seasonal rainfall amounts are forecast to be below average until the harvest period from October. Barley production is also expected to decline in 2023 compared to the previous year, similarly underpinned by expected low yields. However, an anticipated increase in the area sown, with plantings completed by June, reflecting the crop's greater tolerance to dry weather conditions compared to wheat, are partially mitigating the poor yield prospects.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	5-year average (2018/19–2022/23)	2019/20	2020/21	2021/22	2022/23	2023/24
Ratio of world stocks to utilization (%)						
Wheat	*38.0*	*37.6*	*38.0*	*37.8*	*39.7*	*39.5*
Coarse grains	*24.2*	*24.0*	*23.2*	*24.7*	*23.5*	*23.6*
Rice	*37.4*	*36.8*	*37.3*	*37.8*	*37.5*	*37.9*
Total cereals	***30.5***	***30.1***	***30.0***	***30.8***	***30.6***	***30.6***
Ratio of major cereal exporters' supplies to market requirements (%)[I]	*116.1*	*118.5*	*115.0*	*114.7*	*115.7*	*115.9*
Ratio of major exporters' stocks to their total disappearance (%)[II]						
Wheat	*16.8*	*15.6*	*15.2*	*16.0*	*19.0*	*18.6*
Coarse grains	*13.4*	*14.0*	*11.5*	*13.1*	*12.8*	*14.4*
Rice	*27.1*	*26.1*	*28.5*	*28.7*	*29.5*	*30.5*
Total cereals	***19.1***	***18.6***	***18.4***	***19.2***	***20.4***	***21.2***
	Average growth rate 2013–2022	**2019**	**2020**	**2021**	**2022**	**2023**
Annual growth in world cereal production (%)	*1.0*	*2.6*	*2.4*	*1.3*	*-0.9*	*1.1*
Annual growth in cereal production in the LIFDCs (%)	*1.3*	*2.0*	*5.0*	*-7.9*	*2.1*	*-0.2*

	2020	2021	2022	2023*	Change 2023* over 2022*
Selected cereal price indices[III]					
Wheat	*100.7*	*132.1*	*164.9*	*134.8*	*-22.9%*
Maize	*101.9*	*144.8*	*169.5*	*147.7*	*-16.6%*
Rice	*110.2*	*105.8*	*108.8*	*125.1*	*18.7%*

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–June average.

Table A2. World cereal stocks

(million tonnes)

	2019	2020	2021	2022	2023 est.	2024 f'cast
TOTAL CEREALS	***836.1***	***831.9***	***839.4***	***857.3***	***858.6***	***878.1***
Wheat	***274.7***	***286.1***	***294.6***	***294.9***	***311.1***	***313.9***
held by:						
- main exporters[I]	*71.3*	*63.3*	*60.1*	*62.4*	*76.9*	*73.8*
- others	*203.4*	*222.8*	*234.5*	*232.5*	*234.2*	*240.1*
Coarse grains	***374.4***	***358.0***	***349.8***	***365.4***	***352.4***	***365.6***
held by:						
- main exporters[I]	*127.7*	*120.5*	*100.5*	*113.9*	*108.8*	*123.3*
- others	*246.7*	*237.5*	*249.3*	*251.5*	*243.6*	*242.3*
Rice (milled basis)	***187.0***	***187.8***	***195.0***	***197.0***	***195.1***	***198.5***
held by:						
- main exporters[I]	*39.6*	*45.8*	*52.4*	*55.9*	*57.6*	*60.2*
- others	*147.4*	*142.0*	*142.6*	*141.1*	*137.5*	*138.3*
Developed countries	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Australia	*6.6*	*4.2*	*4.8*	*5.4*	*8.0*	*5.5*
Canada	*9.4*	*9.5*	*9.7*	*7.5*	*8.6*	*9.2*
European Union[II]	*41.0*	*41.6*	*36.1*	*42.8*	*45.6*	*49.3*
Japan	*6.6*	*6.9*	*7.0*	*7.1*	*7.1*	*6.9*
Russian Federation	*15.3*	*13.6*	*17.6*	*18.1*	*32.8*	*29.3*
South Africa	*3.7*	*2.7*	*4.0*	*4.7*	*4.9*	*4.7*
Ukraine	*7.7*	*5.6*	*5.9*	*23.2*	*14.1*	*8.6*
United States of America	*91.3*	*80.7*	*58.4*	*57.9*	*56.6*	*76.7*
Developing countries	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Asia	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
China (mainland)	*387.3*	*384.5*	*393.0*	*396.9*	*401.4*	*404.2*
India	*52.0*	*64.3*	*69.0*	*66.7*	*64.0*	*67.7*
Indonesia	*11.5*	*9.6*	*7.8*	*8.0*	*6.7*	*7.3*
Iran (Islamic Republic of)	*9.2*	*10.0*	*11.8*	*12.5*	*12.3*	*12.6*
Pakistan	*3.5*	*2.1*	*4.3*	*6.3*	*5.1*	*4.9*
Philippines	*5.5*	*4.5*	*4.6*	*4.8*	*4.3*	*4.0*
Republic of Korea	*3.8*	*4.6*	*4.5*	*4.7*	*5.0*	*5.0*
Syrian Arab Republic	*2.2*	*3.2*	*4.2*	*2.6*	*1.0*	*1.1*
Türkiye	*6.6*	*10.1*	*10.5*	*9.2*	*11.5*	*11.4*
Africa	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Algeria	*6.6*	*6.7*	*6.3*	*5.0*	*5.3*	*5.6*
Egypt	*5.2*	*5.2*	*4.8*	*4.3*	*3.2*	*3.6*
Ethiopia	*6.2*	*7.1*	*7.4*	*7.0*	*6.6*	*5.7*
Morocco	*7.3*	*5.8*	*3.6*	*5.7*	*4.6*	*5.0*
Nigeria	*2.4*	*2.2*	*2.5*	*1.6*	*1.2*	*1.2*
Tunisia	*1.0*	*1.2*	*1.0*	*1.0*	*1.1*	*1.0*
Central America and the Caribbean	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Mexico	*7.6*	*7.4*	*6.9*	*8.0*	*6.3*	*6.2*
South America	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Argentina	*12.6*	*12.7*	*11.0*	*8.1*	*9.8*	*6.7*
Brazil	*16.9*	*16.7*	*17.5*	*13.8*	*9.3*	*10.1*

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

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

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

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein[I]	US Soft Red Winter No.2[II]	Argentina Trigo Pan[III]	US No.2 Yellow[II]	Argentina[III]	US Gulf
Annual (July/June)						
2009/10	209	185	224	160	168	167
2010/11	316	289	311	254	260	258
2011/12	300	256	264	281	269	286
2012/13	348	310	336	311	278	304
2013/14	318	265	335	217	219	244
2014/15	266	221	246	173	177	247
2015/16	211	194	208	166	170	192
2016/17	197	170	190	156	172	172
2017/18	230	188	203	159	165	190
2018/19	232	210	233	166	166	183
2019/20	220	219	231	163	163	190
2020/21	269	254	263	220	225	308
2021/22	399	343	348	288	275	279
2022/23	389	306	385	299	289	345
Monthly						
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
2022 - November	423	336	415	321	301	367
2022 - December	387	315	394	302	312	361
2023 - January	380	314	375	303	311	365
2023 - February	395	312	364	298	313	363
2023 - March	370	284	349	285	299	343
2023 - April	378	277	345	291	283	342
2023 - May	365	249	366	268	254	307
2023 - June	346	257	360	267	237	292

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

[II] Delivered United States of America Gulf.

[III] Up River f.o.b.

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

(thousand tonnes)

		2021/22 or 2022	2022/23 or 2023
	Marketing year	Total imports	Total imports
AFRICA		***29 471.4***	***28 768.9***
East Africa		***14 363.6***	***13 688.4***
Burundi	Jan/Dec	*199.9*	*196.0*
Comoros	Jan/Dec	*70.8*	*82.0*
Eritrea	Jan/Dec	*459.7*	*470.0*
Ethiopia	Jan/Dec	*1 875.0*	*1 850.0*
Kenya	Oct/Sept	*4 358.6*	*4 596.6*
Rwanda	Jan/Dec	*282.6*	*295.8*
Somalia	Aug/Jul	*1 070.0*	*1 170.0*
South Sudan	Nov/Oct	*720.0*	*700.0*
Sudan	Nov/Oct	*3 599.0*	*2 690.0*
Uganda	Jan/Dec	*813.0*	*623.0*
United Republic of Tanzania	Jun/May	*915.0*	*1 015.0*
Southern Africa		***3 106.4***	***3 499.9***
Lesotho	Apr/Mar	*159.6*	*251.6*
Madagascar	Apr/Mar	*915.5*	*1 081.5*
Malawi	Apr/Mar	*156.5*	*154.5*
Mozambique	Apr/Mar	*1 482.9*	*1 481.0*
Zimbabwe	Apr/Mar	*391.9*	*531.3*
West Africa		***9 158.3***	***8 927.6***
Coastal Countries		***3 291.0***	***3 094.0***
Benin	Jan/Dec	*682.0*	*631.0*
Guinea	Jan/Dec	*1 181.5*	*1 170.5*
Liberia	Jan/Dec	*389.0*	*464.0*
Sierra Leone	Jan/Dec	*573.0*	*463.0*
Togo	Jan/Dec	*465.5*	*365.5*
Sahelian Countries		***5 867.3***	***5 833.6***
Burkina Faso	Nov/Oct	*548.4*	*654.0*
Chad	Nov/Oct	*222.6*	*217.6*
Gambia	Nov/Oct	*363.0*	*388.0*
Guinea-Bissau	Nov/Oct	*83.0*	*153.0*
Mali	Nov/Oct	*606.0*	*736.0*
Mauritania	Nov/Oct	*372.0*	*520.0*
Niger	Nov/Oct	*536.0*	*654.0*
Senegal	Nov/Oct	*3 136.3*	*2 511.0*
Central Africa		***2 843.1***	***2 653.0***
Cameroon	Jan/Dec	*1 532.0*	*1 440.0*
Congo	Jan/Dec	*374.9*	*368.0*
Central African Republic	Jan/Dec	*73.2*	*73.0*
Democratic Republic of the Congo	Jan/Dec	*838.5*	*750.0*
Sao Tome and Principe	Jan/Dec	*24.5*	*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 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

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

(thousand tonnes)

		2021/22 or 2022	2022/23 or 2023
	Marketing year	Total imports	Total imports
ASIA		***18 153.5***	***17 874.4***
Central Asia		***5 351.7***	***5 264.6***
Kyrgyzstan	Jul/Jun	*792.3*	*665.6*
Tajikistan	Jul/Jun	*1 070.0*	*1 142.0*
Uzbekistan	Jul/Jun	*3 489.4*	*3 457.0*
Far East		***1 570.8***	***1 720.8***
Democratic People's Republic of Korea	Nov/Oct	_*	_*
Nepal	Jul/Jun	*1 570.8*	*1 720.8*
Near East		***11 231.0***	***10 889.0***
Afghanistan	Jul/Jun	*3 774.0*	*3 424.0*
Syrian Arab Republic	Jul/Jun	*2 782.0*	*2 720.0*
Yemen	Jan/Dec	*4 675.0*	*4 745.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 442.0***	***1 402.0***
Haiti	Jul/Jun	*671.7*	*627.0*
Nicaragua	Jul/Jun	*770.3*	*775.0*
TOTAL		***49 066.9***	***48 045.3***

Notes: The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for International Development Association (IDA) assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

* Estimates not available.

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

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

The **FAO/GIEWS Country Cereal Balance System (CCBS)**. The CCBS is a unique database created and continuously kept up to date by the GIEWS and Basic Foodstuffs teams of the Markets and Trade Division, with data since 1980. It contains annual supply and utilization balances for the main cereals produced and consumed for over 220 countries/areas, from which (sub) regional and global aggregates are drawn. For more information see the note on the GIEWS website at: https://www.fao.org/giews/data-tools/en/

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This report is based on information available as of **June 2023.**

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ISBN 978-92-5-137991-2 ISSN 2707-2223

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CC6806EN/1/03.23