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President Wolfensohn - Briefings Books for Presidents Meetings - Lunch - Dan
Glickman - Department of Agriculture - March 6, 1996

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125

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A. CLASSIFICATION

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<input type="checkbox"/>	Social Events
<input type="checkbox"/>	Other

B. SUBJECT:

DATE: 03/06/96

LUNCH: SECRETARY DAN GLICKMAN, DEPT. OF AGRICULTURE
VENUE: JDW's private dining room
CONTACT: DENISE @ 720-2594 / FAX: 720-5042
In attendance: JDW, SECRETARY GLIKCMAN & MR. GUS SHUMACHER,
UNDERSECRETARY, FOREIGN AGRICULTURAL SERVICE , McCalla,
Binswanger, Piercy, McHugh, Josie
** JDW REQUESTED THAT THIS BE ARRANGED **
(B) McCalla to provide briefing
2/26 - CIHAT
EXC: JOSIE

C. VPU

Corporate

<input type="checkbox"/>	CTR
<input type="checkbox"/>	EXT
<input type="checkbox"/>	LEG
<input type="checkbox"/>	MPS
<input type="checkbox"/>	OED
<input type="checkbox"/>	SEC/Board
<input type="checkbox"/>	TRE

Regional

<input type="checkbox"/>	AFR
<input type="checkbox"/>	EAP
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<input type="checkbox"/>	LAC
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Central

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<input type="checkbox"/>	DEC
<input type="checkbox"/>	ESD
<input type="checkbox"/>	FPD
<input type="checkbox"/>	FPR
<input type="checkbox"/>	HRO

Affiliates

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<input type="checkbox"/>	ICSID
<input type="checkbox"/>	IFC
<input type="checkbox"/>	Inspection Panel
<input type="checkbox"/>	Kennedy Center
<input type="checkbox"/>	MIGA

D. EXTERNAL PARTNER

<input type="checkbox"/>	IMF
<input type="checkbox"/>	UN
<input type="checkbox"/>	MDB/Other IO
<input type="checkbox"/>	NGO
<input type="checkbox"/>	Private Sector

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<input type="checkbox"/>	Part II
<input type="checkbox"/>	Other

E. COMMENTS:

OFFICE MEMORANDUM


You have the executive summary of the Ag Action plan in your Exec Case meeting folder.

Also attending the lunch from the Bank:

- Lomax
- Binswanger
- Piercy
- McHugh (was on Ag. Committee in House)

DATE: March 1, 1996

TO: Mr. James D. Wolfensohn, EXC

FROM: Alex F. McCalla, AGRDR 

EXTENSION: 85028

SUBJECT: **Lunch with U.S. Secretary of Agriculture, Dan Glickman**

You are scheduled to have lunch with Mr. Glickman on Wednesday, March 6. Mr. Glickman will be accompanied by Mr. Augustus (Gus) Schumacher, Jr., Administrator of the Foreign Agricultural Service (FAS), USDA. Hans Binswanger and myself will join you from AGR. I believe Matt McHugh and Rachel Lomax from your office are also invited.

While I expect the lunch to be very informal, a few background notes may be useful.

- Mr. Glickman was sworn in as Secretary of Agriculture on March 30, 1995. Prior to that, he represented the 4th Kansas Congressional District for 18 years. While in Congress, he served on the House Agriculture Committee. Mr. Glickman's professional training is in law. (A fuller vitae is attached.)

- Mr. Glickman will be accompanied by Gus Schumacher, Administrator of the Foreign Agricultural Service, the agency charged with promoting U.S. agriculture exports. Mr. Schumacher worked for the Bank for many years. His last Bank assignment was on Poland. From 1985-90, he was Commissioner of Food and Agriculture for the Commonwealth of Massachusetts. (A fuller vitae is attached.)

In the attached letter to me (dated February 29), Mr. Schumacher indicates three possible areas of interest:

- **The changing world food system and food security issues, in particular Russia, China, India and Africa.**

Comment: Here the concern is the likely future international market position of these large players - Will Russia get its agricultural act together and become a potentially large agriculture exporter?

- How will China feed itself? The debate rages on fueled by Les Brown's recent book. This year, after many years as a net exporter of grains, China has emerged as a large importer. Will that continue? If so, how much will they import?

- India, long considered a food deficit country, is sitting on a large stocks of grain (30+ mmt) and is actively trying to export wheat and rice. Will that continue?

- Africa in the 1980's experienced declining per capita food production. Will Africa continue to be a poor performer?

For all of these questions, we should be seeking USDA views because they have 70+ Agricultural Attachées stationed around the world providing them with information.

- **The November 13-17 World Food Summit and the Bank's Role.**

Comment: You have been invited to make a statement at the Summit. I am currently drafting a response for you to Mr. Diouf, in which I hope I may say you will attend. In the Agricultural Action Plan, we recommend a prominent role for you at the Summit to publicize the Bank Group's new commitment to rural economic growth. You may wish to confirm your role.

DOW
| You should
| not commit
| to this
| now.
| gone

The Bank has so far provided \$500,000 from the Special Grants account to support the Summit and we are providing technical inputs on several papers.

- **Identifying how "Team USDA" and the Bank can increase collaborative working relations.**

Comment: As Mr. Schumacher's letter suggests, with declining development and food aid assistance, new ways to address global food security issues are needed. Mr. Glickman wants to discuss ways of working with the Bank to help alleviate global food security problems.

Several possible avenues for collaboration present themselves -

- drawing on USDA's enormous bank of technical talent, for example, in forestry, soil conservation, biological research, regulation and grading and economic analyses, to strengthen Bank projects and programs.

- a second way would be through the secondment of USDA staff to Bank country programs. An almost completed arrangement between FAS and our China Department for the secondment of an FAS staff member (Mr. Philhower) to Joe Goldberg's division for 1 year may come up in the conversation (Mr. Goldberg's memo about this issue is attached).

*This
secondment
is being
finalized.
Mr. Philhower
will be
working in
East Asia and
Nick Hoge (Director)
will be signing
the agreement.*

- a third way would be to share analysis of emerging global trends on a regular basis as we have been trying to do on the food price issue.

In addition to these specific points identified by Mr. Schumacher, it is possible Mr. Glickman will want to talk about rising grain prices (attached is our most recent memo on this) and he may have heard of the Agricultural Action Plan - "From Vision to Action in the Rural Sector" which I delivered to you on February 23. You may wish to tell him about possible next steps.

I trust this will be enough. I look forward to the lunch and the conversation with Mr. Glickman.

Attachments

Cc: Messrs. Caio Koch-Weser, Ismail Serageldin, Hans Binswanger

AMcCalla:fsc

CVs

NEWS

United States
Department of
Agriculture

Office of
Communications

News Distribution
Room 506-A
Washington, D.C. 20250

No. 4542 (GLICKman)

Biography

DAN GLICKMAN

U.S. Secretary of Agriculture

Birthday: November 24, 1944
Birthplace: Wichita, Kansas
Sworn In: March 30, 1995

Dan Glickman was sworn in as the 26th U.S. Secretary of Agriculture on March 30, 1995. Prior to his confirmation, Glickman represented for 18 years Kansas' 4th Congressional District in the U.S. House of Representatives.

During his congressional career, Glickman developed a reputation for being an inquisitive and thoughtful legislator. Whether the issue was fighting for improved airline safety or serving as a chief architect of the last four farm bills, Glickman has been a vocal advocate for the people of Kansas and the country.

As he begins his service as Secretary of Agriculture, Glickman will bring with him the experience gained by serving nearly two decades on the House Agriculture Committee, including six years as chairman of the Subcommittee on General Farm Commodities and its predecessor, the Subcommittee on Wheat, Soybeans and Feed Grains.

He is widely recognized as a leading spokesman for American agriculture. In addition to his work on farm bills in 1977, 1981, 1985 and 1990, Glickman led the way in areas such as expanding trade in agriculture goods, food safety, and reinventing the USDA. Glickman was the original author of House legislation to streamline and reorganize the USDA.

In recognition of his hard work and leadership, in January 1993 the Speaker of the House appointed Glickman to serve a two-year term as the Chairman of the House Permanent Select Committee on Intelligence. This appointment made Glickman the first full committee chairman from Kansas in 40 years.

As chairman of the intelligence committee, Glickman pursued policies to "de-mystify" the intelligence community by holding open hearings, pushing the intelligence community to publicly explain its functions in the post-Cold War era, and reducing the number of classified documents. In addition, Glickman launched a major committee investigation into the Aldrich Ames spy case.

-more-

Glickman's legal experience and his seat on the Judiciary Committee enabled him to become a leader in the battle to make reasonable reforms in general aviation product liability laws. He also devoted considerable time to finding ways to strengthen lobbying disclosure laws, revamp the administrative law judge corps and develop effective ways to combat crime. He was the author of a 1987 law that created criminal penalties for violence directed at religious property and practice.

Prior to being elected to Congress in 1976, Glickman served as president of the Wichita, Kansas School Board; was a partner in the law firm of Sargent, Klenda and Glickman; and served as a trial attorney for the U.S. Securities and Exchange Commission. Glickman received his B.A. in history from the University of Michigan and his law degree from The George Washington University. He married Rhoda Yura of Detroit in 1966. They have two children, Jon, 25 and Amy, 22.

#

March 30, 1995

NEWS

United States
Department of
Agriculture

Office of
Communications

News Distribution
Room 506-A
Washington, D.C. 20250

No. 7828

Biography

AUGUST SCHUMACHER, JR.
Administrator, Foreign Agricultural Service
U.S. Department of Agriculture

August Schumacher, Jr. was appointed Administrator of the U.S. Department of Agriculture's (USDA) Foreign Agricultural Service on July 25, 1994. As Administrator, Schumacher is a strong advocate for the interests of America's farmers both at home and abroad. He has extensive contacts with U.S. farmers, agribusiness leaders, members of trade associations and cooperatives, foreign buyers and importers and U.S. and foreign government officials. He has worked hard to maintain and develop creative and innovative market development tools to ensure that U.S. agricultural exports continue to grow at their record pace.

He oversees the administration of programs to foster exports of American agricultural, fish and forest products. His Agency reports on international agricultural production and trade, handles USDA's responsibilities in international trade agreements and negotiations, administers the Export Enhancement, Foreign Market Development and Market Promotion Programs, coordinates USDA's role in international food aid programs and provides linkages to worldwide resources and technologies that can benefit U.S. agriculture.

Before coming to USDA, Schumacher worked for the World Bank's agricultural lending group on a series of projects on agriculture sector policy adjustment, forestry and biodiversity protection in Central Europe, Belarus and Ukraine. In addition, he has worked in China, Latin America, the Middle East and Africa.

Schumacher also served as Commissioner of Food and Agriculture for the Commonwealth of Massachusetts during 1985-90. During his tenure as Commissioner of Food and Agriculture in Massachusetts, Schumacher was heavily involved in the joint efforts of USDA and the National Association of State Departments of Agriculture (NASDA) to promote agricultural trade. He hosted the 1990 NASDA Food Expo in Boston and participated in several agri-trade missions to Europe and Japan. As Commissioner, he also fostered several state market development initiatives including the Women, Infants, and Children (WIC) farmers' market coupon program.

Schumacher is from a farm family in Lexington, Mass. He attended Harvard College and the London School of Economics. He was also a research associate with the Agribusiness Department of the Harvard Business School.

#

May 1995

Background



United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C.
20250

FEB 29 1996

Mr. Alex F. McCalla
Director
Agriculture and Natural Resources Department
The World Bank
1818 H Street, N.W., Room S 8055
Washington, D.C. 20433

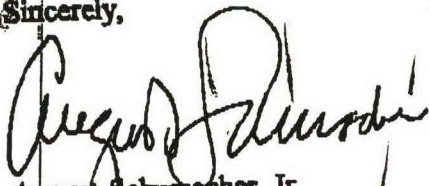
Dear Mr. McCalla:

Secretary Glickman and I are looking forward to lunch Wednesday, March 6, 12:00 p.m., with you and Mr. Wolfensohn at The World Bank. Some items of interest to the Secretary during our discussion are:

- The changing world food system and food security issues; in particular Russia, China, India, and Africa;
- The November 13-17 World Food Summit and the Bank's role; and
- Identifying how "Team USDA" and the Bank can increase collaborative working relations.

The prospect of declining development and food aid assistance necessitates a new look at allocation of available resources to address global food security. To respond to the changing environment we find ourselves in, we need to find new ways to cooperate and collaborate more fully where mutual interests exist. Agriculture remains the backbone of most countries economies, and this is especially true in the developing countries and emerging markets of the world. We look forward to discussing with you and Mr. Wolfensohn how USDA and the Bank can identify ways to work together to help alleviate global food security problems.

Sincerely,



August Schumacher, Jr.
Administrator

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Document Date February 29, 1996	Document Type Memorandum			
Correspondents / Participants To: Alexander McCalla From: Joseph Goldberg, EA2RS				
Subject / Title Wolfensohn Meeting with USDA Secretary Glickman				
Exception(s) Personal Information				
Additional Comments		<p>The item(s) identified above has/have been removed in accordance with The World Bank Policy on Access to Information or other disclosure policies of the World Bank Group.</p> <table border="1"><tr><td>Withdrawn by Diego Hernández</td><td>Date February 3, 2025</td></tr></table>	Withdrawn by Diego Hernández	Date February 3, 2025
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McCalla, Alexander F.
S 8-055

THE WORLD BANK/IFC/M.I.G.A.

OFFICE MEMORANDUM

DATE: November 30, 1995

TO: Distribution

FROM: Alexander McCalla, Director, AGR 

EXTENSION: 85028

SUBJECT: **Coping With Rising Grain Prices: Update**

Following my memo of August 10, please find attached an update on the world grain market that supersedes page 1 of the August 10 memo.

Prices of all grains have continued to increase and are now expected to remain high for at least another year. Reduced export subsidies and lower food aid shipments can be expected, which will further increase import costs for food deficit countries. Apart from balance of payment effects, the fiscal burden of food consumption subsidies will increase and access to food by the poorest will be threatened unless targeting is improved.

Existing programs and facilities described in my August 10 memo remain the most appropriate vehicles and are likely to suffice to contend with balance of payments effects; but the fiscal and access problems are likely to require special analytical efforts and innovative responses.

Distribution:

- Country Directors
- Agriculture and Natural Resource Division Chiefs
- Country Operations Division Chiefs
- Human Resources Development Division Chiefs
- Chief Economists
- Lead Economists
- Project Advisers
- Technical Department Advisers

CC: Messrs. I. Serageldin (ESDVP), M. Bruno (DECVP)

World Grain Market Update¹

The world's grains markets tightened further this quarter as production problems in the United States continued. Prices of all grains increased and are expected to remain high for at least another year. Stock levels have fallen to the lowest level on record when measured relative to consumption and are below levels which can be rebuilt in a single year. This suggests that the period of high prices could continue for several years. Reduced export subsidies and lower food aid shipments can be expected which will further increase import costs for food deficit countries.

The USDA's October estimate of world grain production was for a reduction of 3.7% compared to last year and this confirmed the common views of an already tight world market. World consumption is expected to exceed production by 63 million tons and cause stocks to fall to the lowest level on record. The stock-to-use ratio, which is the common measure of the availability of stocks, is expected to fall to 13% by the end of the 1995/96 crop year (June 1996). This compares to a ratio of 17% in 1994/95 and is below the previous low of 15% in 1972.

Export prices for maize, rice and wheat rose by 44.0%, 48.3% and 69.1% respectively from July 1994 to October 1995. Further price increases will depend on final production numbers and import demand for the remainder of the crop year. Most of the large grain producing countries and regions such as China, India, Eastern Europe, and the European Union have good grain crops which should moderate import demand. The FSU has a very poor grain harvest (-8.2% from last year and -36% from the 1990 level), however, continuing economic problems and a lack of foreign exchange will keep imports low. Most of the major exporting countries, except the United States, have good to excellent crops and should fill the export gap left by the poor US harvest.

Next year appears to be shaping up as another tight market with high and volatile prices--a repeat of this year--because stocks are below levels which can be rebuilt in a single year. For example, consumption is expected to exceed production by 63 million tons this year and stocks are expected to fall to 232 million tons. If 1996 production were to increase by 5.7% to equal the 1992 record harvest, this would only add roughly 20 million tons to world stocks. This would not be enough to change the market situation significantly and the stock-to-use ratio would increase to only 14% which would still be near the lowest levels on record. Consequently, the outlook is for another year of tight market conditions in 1996.

¹ Prepared by Donald Mitchell, Senior Economist, Commodity Policy and Analysis Unit, International Economics Department, The World Bank.

WHEAT

Wheat prices rose to an average of \$203.7/ton during October for US hard red winter wheat (f.o.b.). This compares with a one year ago price of \$167.2/ton during the same month. World production is estimated to be 1.5% higher than for the previous year, but still below consumption. Stocks are expected to fall to 17.8% of consumption by the end of the 1995/96 crop year in June 1996, compared to 20.7% last year and an average of 26.4% during the past 10 years. Some rebuilding of stocks is expected in 1996/97 as current high prices increase area planted and fertilizer use on wheat. However, stocks are expected to still remain low relative to consumption and prices should remain high. The Chicago futures prices remain near current levels until the May of 1996 contract before declining on the expectations for the next harvest.

The world wheat market will experience the third consecutive year where production is less than consumption in 1995/96, however, adequate production in most of the major importing countries should prevent large import demand and this may hold price increases to what has already occurred. The only major importing country or region with a significant production shortfall this year is the former Soviet Union (FSU), but imports are not expected to increase significantly due to economic constraints. The FSU is expected to have net imports of only 5.5 million tons compared to 17.3 million tons in 1992/93. China is expected to remain the world's largest importer with imports of 11 million tons, despite a relatively good harvest. World trade is projected to fall to about 95 million tons in 1995/96, compared with imports of 97 million last year and 113 million tons in 1992/93.

MAIZE AND OTHER COARSE GRAINS

Reduced production and low stocks caused maize prices to rise to \$140.9/ton for US exports during October. Prices are expected to remain high for the next year and, depending on 1996 growing condition, prices may remain near current levels through 1997. This view is consistent with futures prices which remain high through July 1996 contract deliveries before declining with the 1996 harvest.

World coarse grain production for 1995/96 is projected to be 8% lower than for the previous year due to a poor US crop. The US maize crop is expected to be 25% below the previous year due to a poor spring planting and early frosts. End-of-year world stocks are expected to fall to the lowest level on record when measured relative to consumption. This will be the fourth consecutive year that world production has been lower than consumption. Trade levels are expected to fall due to higher prices and tight export supplies.

China is expected to become a net importer of coarse grains in 1995/96 following several years as the world's second largest net exporter after the United States. The reversal follows a surge in demand for livestock feed and is expected despite a record production which is nearly 8% higher in 1995/96 than for the previous year. This reversal contributed to the overall tightness in the coarse grain market as China shifts from a net exporter of 10.8 million tons in 1993/94 to a 3 million ton net importer in 1995/96.

RICE

Rice prices have been rising along with other grains prices and stocks are expected to fall to the lowest levels in more than 20 years. This occurs despite near record world production in 1995. World rice consumption has exceeded production every year since 1990/91 and the stock-to-use ratio is expected to fall to 12% by the end of the 1995/96 crop year (July 1996). This compares with an average stock-to-use ratio of 16% during the decade of the 1980s. The Chicago rough rice futures contract continues to show higher delivery prices through July 1996.

The large supplies of low quality rice being exported by India should offset low stocks in other exporting countries. India has emerged as a major exporter of rice with an expected 3.3 million tons to be exported in 1995. India has large stocks of rice available for export and little capacity to properly store the rice. Consequently, India is aggressively pursuing exports. The other major exporters of low quality rice such as Myanmar, China and Vietnam have exhausted current export supplies. World imports were a record 19.4 million tons in 1994/95 (year ending June 1995) as Bangladesh, China, Indonesia and Iran were all large buyers.

Despite the abundance of low quality rice, the price spread between the high and low quality rice remains narrow. Thai A1 Special 100% broken rice was quoted at \$294.4/ton in October compared to \$382.6/ton for Thai 5% broken white rice. This 30% margin of premium to low quality rice compares with an average margin of 49.7% in 1993 and 46.8% in 1994 and reflects the strong buying of low quality rice by Bangladesh, China and Indonesia.

GRAIN IMPORT REQUIREMENTS

According to the October/November estimates of cereals import requirements from FAO, the low income food deficit countries will have total import requirements which are slightly larger than in 1994/95. However, Africa will have a 15% larger import requirement because of poor harvests. The drought in southern Africa has caused an estimated 10 million people to need emergency food aid assistance. Asia will have slightly larger import requirements while countries in Central and South America, and Europe will have lower import requirements. The monsoon in Asia has improved after a poor start, and prospects are now considered good for Asian rice and coarse grain production despite flooding in China. The individual countries expected to require larger cereal imports in 1995/96 relative to the previous year include Afghanistan, Angola, Cameroon, China, Kenya, Morocco, Mozambique, Zambia and Zimbabwe.

(The latest FAO import requirements are attached.)

FOOD AID

The declining trend in food aid deliveries continues in 1995 according to the World Food Programme report. (See attached report).

CONTACTS

For additional information on specific programs, please contact:

Mr. Hans Binswanger
Senior Agricultural Policy Adviser
Agriculture & Natural Resources Department
The World Bank
Tel: 202-473-1871

Ms. Nancy Happe or Mr. Mark Tureen
Chief of Special Facilities and Issues Division
Policy Development and Review Department
International Monetary Fund
Tel: 202-623-8675 or 202 623-4534

Ms. Dianne Spearman
Chief, Policy Affairs Service
Policy and Public Affairs Division
World Food Programme
Tel: 39-6-5228-2601

Updated 11/28/95

ESTIMATED IMPORT REQUIREMENTS OF CEREALS: LOW-INCOME FOOD-DEFICIT Countries 1/(Thousand tons)

(b) 1995/96 estimates for LIFD countries which have entered the 1995/96 marketing year

COUNTRY	Marketing year	1994/95 or 1995			1995/96			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		14 738.8	1 644.7	16 383.5	17 885	6 256.7	1 036.5	5 220.2
Northern Africa		10 632.4	257.2	10 889.6	11 538	4 943.7	151.2	4 792.5
Egypt	July/June	8 611.3	178.3	8 789.6	7 505	2 555.6	151.2	2 404.4
Morocco	July/June	2 021.1	78.9	2 100.0	4 033	2 388.1	0.0	2 388.1
Eastern Africa		798.0	353.4	1 151.4	1 410	100.8	100.8	0.0
Kenya	July/June	472.3	166.0	638.3	1 075	28.9	28.9	0.0
Somalia	Sept./Aug.	249.1	45.9	295.0	310	51.4	51.4	0.0
Tanzania	June/May	76.6	141.5	218.1	25	20.5	20.5	0.0
Southern Africa		1 367.5	962.6	2 330.1	2 761	953.9	716.2	237.7
Angola	April/March	127.3	274.9	402.2	560	172.0	165.4	6.6
Lesotho	April/March	171.9	32.1	204.0	297	96.6	46.4	50.2
Madagascar	April/March	171.5	26.5	198.0	146	21.0	21.0	0.0
Malawi	April/March	218.0	266.9	484.9	180	177.8	169.9	7.9
Mozambique	April/March	42.3	346.7	389.0	446	302.1	261.0	41.1
Swaziland	May/April	67.3	8.7	76.0	93	12.9	6.0	6.9
Zambia	May/April	386.1	1.3	387.4	589	39.8	39.8	0.0
Zimbabwe	April/March	183.1	5.5	188.6	450	131.7	6.7	125.0
Western Africa		1 544.2	55.8	1 600.0	1 687	234.9	44.9	190.0
Coastal countries		1 544.2	55.8	1 600.0	1 687	234.9	44.9	190.0
Côte d'Ivoire	July/June	444.2	55.8	500.0	587	44.9	44.9	0.0
Nigeria	July/June	1 100.0	0.0	1 100.0	1 100	190.0	0.0	190.0
Central Africa		396.7	15.7	412.4	489	23.4	23.4	0.0
Cameroon	July/June	282.2	2.8	285.0	347	1.6	1.6	0.0
Cent.Afr.Rep.	Sept./Aug.	29.2	0.8	30.0	34	0.0	0.0	0.0
Congo	July/June	85.3	12.1	97.4	108	21.8	21.8	0.0
ASIA		37 288.1	1 774.7	39 062.8	39 741	6 631.7	705.1	5 926.6
Afghanistan	July/June	795.3	94.7	890.0	1 250	317.4	67.4	250.0
Bangladesh	July/June	1 589.3	934.8	2 524.1	2 050	354.0	82.0	272.0
Bhutan	July/June	32.0	0.2	32.2	32	0.0	0.0	0.0
China	July/June	22 621.7	231.2	22 852.9	23 400	4 122.8	96.6	4 026.2
India	July/June	79.0	235.0	314.0	150	168.8	168.8	0.0
Indonesia	April/March	5 166.5	32.2	5 198.7	5 735	510.3	17.7	492.6
Jordan	July/June	1 494.1	128.8	1 622.9	1 610	361.7	118.8	242.9
Nepal	July/June	125.6	11.4	137.0	84	21.3	21.3	0.0
Pakistan	May/April	2 277.9	22.1	2 300.0	2 200	145.0	106.6	38.4
Philippines	July/June	2 369.1	30.9	2 400.0	2 550	605.7	18.2	587.5
Syria	July/June	737.6	53.4	791.0	680	24.7	7.7	17.0
CENTRAL AMERICA		1 958.2	350.4	2 308.6	1 770	263.5	213.8	49.7
El Salvador	Aug./July	475.3	18.3	493.6	374	0.0	0.0	0.0
Guatemala	July/June	542.6	120.4	663.0	540	54.3	48.5	5.8
Haiti	July/June	302.0	100.0	402.0	401	98.8	77.2	21.6
Honduras	July/June	433.0	80.0	513.0	280	59.6	45.0	14.6
Nicaragua	July/June	205.3	31.7	237.0	175	50.8	43.1	7.7
SOUTH AMERICA		159.2	176.8	336.0	300	65.2	65.2	0.0
Bolivia	July/June	159.2	176.8	336.0	300	65.2	65.2	0.0
EUROPE / CIS 5/ 6/		5 178.2	2 155.8	7 334.0	6 410	908.5	908.5	0.0
Armenia	July/June	24.0	463.0	487.0	430	182.0	182.0	0.0
Albania	July/June	276.2	33.8	310.0	310	0.0	0.0	0.0
Azerbaijan	July/June	304.0	366.0	670.0	690	139.8	139.8	0.0
Georgia	July/June	48.0	677.0	725.0	560	219.7	219.7	0.0
Kyrgyz Republic	July/June	209.0	124.0	333.0	350	130.0	130.0	0.0
Lithuania	July/June	5.0	20.0	25.0	30	0.0	0.0	0.0
Moldova	July/June	208.0	252.0	460.0	105	52.0	52.0	0.0
Macedonia, FYR	July/June	194.0	46.0	240.0	240	0.0	0.0	0.0
Romania	July/June	260.0	0.0	260.0	260	0.0	0.0	0.0
Tajikistan	July/June	285.0	124.0	409.0	560	185.0	185.0	0.0
Turkmenistan	July/June	570.0	50.0	620.0	470	0.0	0.0	0.0
Uzbekistan	July/June	2 805.0	0.0	2 805.0	2 405	0.0	0.0	0.0
TOTAL		59 322.5	6 102.4	65 424.9	66 294	14 125.6	2 929.1	11 196.5

for footnotes, please see page 54.

ESTIMATED IMPORT REQUIREMENTS OF CEREALS: LOW-INCOME FOOD-DEFICIT Countries 1/(Thousand tons)

(b) 1995/96 estimates for LIFD countries which have entered the 1995/96 marketing year

COUNTRY	Marketing year	1994/95 or 1995				1995/96		
		Actual imports		Total import requirements (excluding re-exports)	Total commercial and aid	Import position		Commercial purchases
		Commercial purchases	Food aid			Food aid allocated committed or shipped		
AFRICA		14,998.5	1,832.1	16,830.6	19,300	8,015.3	1,044.3	6,971.0
Northern Africa		10,695.9	307.0	11,002.9	12,410	6,294.2	195.6	6,098.6
Egypt	July/June	8,674.8	228.1	8,902.9	8,550	3,743.9	195.6	3,548.3
Morocco	July/June	2,021.1	78.9	2,100.0	3,860	2,550.3	0.0	2,550.3
Eastern Africa		797.5	372.5	1,170.0	1,425	173.1	100.8	72.3
Kenya	July/June	490.5	166.0	656.5	1,075	73.4	28.9	44.5
Somalia	Sept./Aug.	230.0	65.0	295.0	310	63.4	51.4	12.0
Tanzania	June/May	77.0	141.5	218.5	40	36.3	20.5	15.8
Southern Africa		1,348.7	962.6	2,311.3	2,971	989.5	679.6	309.9
Angola	April/March	127.3	274.9	402.2	560	179.6	156.0	23.6
Lesotho	April/March	171.9	32.1	204.0	297	70.2	20.0	50.2
Madagascar	April/March	152.7	26.5	179.2	146	22.4	21.0	1.4
Malawi	April/March	218.0	266.9	484.9	180	177.8	169.9	7.9
Mozambique	April/March	42.3	346.7	389.0	446	313.4	265.0	48.4
Swaziland	May/April	67.3	8.7	76.0	93	12.9	6.0	6.9
Zambia	May/April	386.1	1.3	387.4	589	35.0	35.0	0.0
Zimbabwe	April/March	183.1	5.5	188.6	660	178.2	6.7	171.5
Western Africa		1,759.7	174.3	1,934.0	2,005	535.1	44.9	490.2
Coastal countries		1,759.7	174.3	1,934.0	2,005	535.1	44.9	490.2
Côte d'Ivoire	July/June	444.2	55.8	500.0	590	79.7	44.9	34.8
Ghana	Oct./Sept.	215.5	118.5	334.0	295	5.0	0.0	5.0
Nigeria	July/June	1,100.0	0.0	1,100.0	1,120	450.4	0.0	450.4
Central Africa		396.7	15.7	412.4	489	23.4	23.4	0.0
Cameroon	July/June	282.2	2.8	285.0	347	1.6	1.6	0.0
Cent.Afr.Rep.	Sept./Aug.	29.2	0.8	30.0	34	0.0	0.0	0.0
Congo	July/June	85.3	12.1	97.4	108	21.8	21.8	0.0
ASIA		37,459.0	1,826.3	39,285.3	40,049	16,027.8	692.6	15,335.2
Afghanistan	July/June	788.1	101.9	890.0	1,250	332.4	80.1	252.3
Bangladesh	July/June	1,632.8	934.8	2,567.6	2,050	973.0	120.0	853.0
Bhutan	July/June	32.0	0.4	32.4	32	0.0	0.0	0.0
China 3/	July/June	22,624.4	212.5	22,836.9	23,460	10,026.1	119.8	9,906.3
India	July/June	0.0	277.1	277.1	250	174.1	174.1	0.0
Indonesia	April/March	5,196.2	32.2	5,228.4	5,735	1,675.3	17.5	1,657.8
Jordan	July/June	1,494.2	130.5	1,624.7	1,540	633.5	124.3	509.2
Mongolia	Oct./Sept.	128.6	11.4	140.0	170	0.0	0.0	0.0
Nepal	July/June	126.7	10.3	137.0	82	23.0	23.0	0.0
Pakistan 4/	May/April	2,346.7	25.0	2,371.7	2,100	999.7	15.0	984.7
Philippines	July/June	2,364.0	32.5	2,396.5	2,700	967.8	11.1	956.7
Syria	July/June	725.3	57.7	783.0	680	222.9	7.7	215.2
CENTRAL AMERICA		1,773.6	491.1	2,264.7	1,675	697.7	242.9	454.8
El Salvador	Aug./July	474.4	18.3	492.7	329	103.2	2.7	100.5
Guatemala	July/June	182.7	246.3	429.0	520	238.5	47.7	195.4
Haiti	July/June	278.6	114.4	393.0	401	169.4	90.9	78.5
Honduras	July/June	428.9	84.1	513.0	250	96.1	57.5	38.6
Nicaragua	July/June	209.0	28.0	237.0	175	90.5	48.7	41.8
SOUTH AMERICA		185.5	150.5	336.0	275	100.6	70.8	29.8
Bolivia	July/June	185.5	150.5	336.0	275	100.6	70.8	29.8
EUROPE / CIS 5/ 6/		5,108.2	2,199.8	7,308.0	6,337	1,018.0	1,018.0	0.0
Armenia	July/June	14.0	463.0	477.0	430	150.0	150.0	0.0
Albania	July/June	276.2	33.8	310.0	310	0.0	0.0	0.0
Azerbaijan	July/June	304.0	366.0	670.0	690	170.0	170.0	0.0
Georgia	July/June	48.0	677.0	725.0	560	267.0	267.0	0.0
Kyrgyz Republic	July/June	209.0	124.0	333.0	352	130.0	130.0	0.0
Lithuania	July/June	5.0	64.0	69.0	75	0.0	0.0	0.0
Moldova	July/June	208.0	252.0	460.0	125	48.0	48.0	0.0
Macedonia, FYR	July/June	194.0	46.0	240.0	240	0.0	0.0	0.0
Romania	July/June	190.0	0.0	190.0	120	0.0	0.0	0.0
Tajikistan	July/June	285.0	124.0	409.0	560	200.0	200.0	0.0
Turkmenistan	July/June	570.0	50.0	620.0	470	53.0	53.0	0.0
Uzbekistan	July/June	2,805.0	0.0	2,805.0	2,405	0.0	0.0	0.0
TOTAL		59,524.8	6,499.8	66,024.6	67,735	25,859.4	3,068.6	22,790.8

for footnotes, please see page 53.

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1345 in 1993), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes refugee needs.

3/ Includes import requirements of Taiwan Province. 4/ Excludes Afghan refugee requirements. 5/ Classified as LIFD countries as of January 1995. 6/ Data include intratrade between the Republics.

Foodcrops and Shortages,
October/November 1995

FOOD AID MONITOR NUMBER 24

(September 1995)

This analysis presents the first insight into food aid trends in 1995. The most meaningful findings are underlined and put into perspective. The data presented have been extracted from the database of the International Food Aid Information System (INTERFAIS) which was developed by WFP for the purpose of improving food aid management, coordination and data analysis. Requests for additional information should be addressed to WFP/FSII.

HIGHLIGHTS

The declining trend in food aid deliveries, which started in 1994, continues in 1995: Global food aid deliveries in 1995 are expected to be below the 1994 level.

After a large reduction in 1994, programme food aid continues to decrease in 1995.

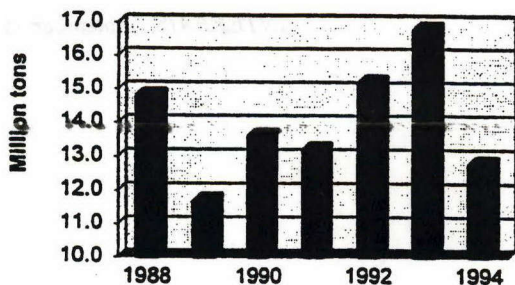
Deliveries made to Eastern European countries and the Newly Independent States of the former USSR slow down in 1995 compared with the previous year.

Global Food Aid Deliveries

According to data available so far, global deliveries in 1995 will be lower than in 1994. To date, deliveries amount to 5.9 million tons, compared with 8.0 million tons last September. Information on future deliveries in 1995 confirms the decreasing trend.

Global deliveries in 1994 totalled 12.9 million tons, 9 percent less than the 1988-93 average and a sharp drop compared with the 1993 record level (Figure 1)¹.

Figure 1: Global Food Aid Deliveries in 1988-94



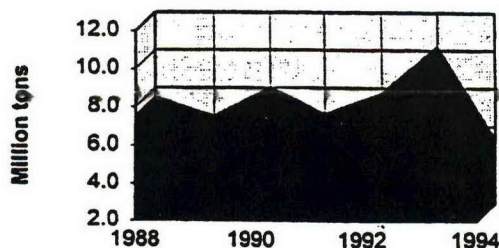
INTERFAIS, September 1995

Food Aid Deliveries by Category

The quantities of food delivered as programme aid so far were exceptionally low, and no change in trend is foreseen for the last few months of 1995. It is still unclear whether project and emergency food aid assistance will go through substantial changes.

Programme food aid deliveries so far amounted to 1.8 million tons, compared with 3.0 million tons in September 1994. The final figure for programme aid is therefore expected to be lower for 1995 than for 1994.

Figure 2: Programme Food Aid



INTERFAIS, September 1995

¹ A comprehensive analysis of 1994 Food Aid Flows was issued in April 1995 and is available on request

In 1994, programme food aid deliveries reached an unusually low level of 5.3 million tons, a 32 percent reduction compared with the 1988-93 average (Figure 2).

Food Aid Deliveries by Region

The breakdown of deliveries by region for 1994 and 1995 is provided in Figures 3 and 4, on the basis of the data available in September for both years. To date, there are no major changes in the share of food aid delivered to the regions in 1995 compared with 1994, except in the case of the Eastern European Countries and the Newly Independent States of the Former USSR region (NIS).

Deliveries to the Eastern European Countries and the NIS region amount so far to 1.1 million tons, well below the 2.0 million tons recorded last year by September. In proportion, deliveries to this region for the first nine months of the year dropped from 27% last year to 19% in 1995.

In 1994, total deliveries to this region were 3.2 million tons, a quarter of global food aid deliveries for the year but less than half the 1993 level, 6.9 million tons.

Figure 3: Food Aid Deliveries by region, on the basis of data available in September 1994

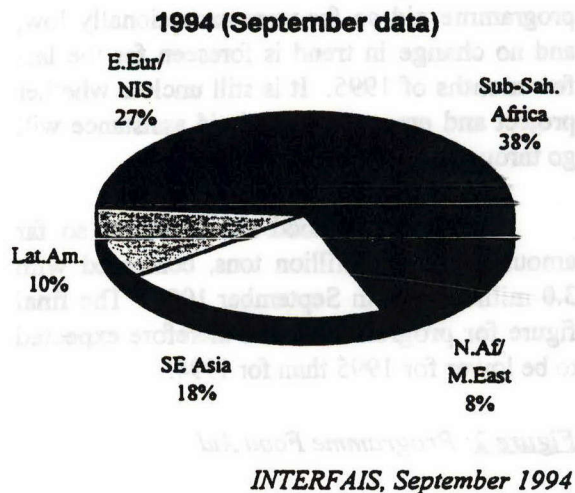


Figure 4: Food Aid Deliveries by region, on the basis of data available in September 1995

