Cereal production in 2018 anticipated at below-average level due to prolonged dry spells

The aggregate 2018 cereal production is anticipated at 950 000 tonnes, slightly lower than the previous five-year average, mainly due to a decline in maize production.

Planting of the 2018 postrera season maize crop finalized in September and harvesting operations are expected to start in January. The aggregate 2018 maize production is anticipated at a below-average level of 830 000 tonnes, reflecting unfavourable weather conditions during the primera season. The prolonged dry spells from June to early-August affected 112 municipalities of 10 departments, particularly in the eastern region, where 29 consecutive days with no rainfall were recorded. It is officially estimated that the drought caused 45 000 tonnes of primera season maize crop losses, which represents about 4 percent of the 2018/19 production target. In August, the Government distributed certified seeds and fertilizers in order to allow the affected farmers to replant and limit the losses. Additional crop losses were triggered by torrential rains during the first half of October, which were officially estimated at 8 400 tonnes of postrera season maize crop.

The 2018 sorghum production is expected at 95 000 tonnes, near last year’s production. The crop is more resistant to dry weather conditions, however, some crops were lost due to the torrential rains in October.

Cereal import requirements in 2018/19 forecast to increase

Reflecting lower domestic availabilities and a sustained demand from the poultry sector, cereal import requirements in the 2018/19 marketing year (September/August) are forecast to increase by 12 percent from the last five-year average and reach 1 million tonnes.
Prices of maize and beans higher than year-earlier levels in October

Despite a significant decline in October, prices of white maize remained about 50 percent higher year-on-year. Prices had a rising trend since early 2018, reflecting higher input and petroleum costs as well as concerns over the estimated decline in production. Prices of red beans strengthened in October due to concerns over the main season output affected by torrential rains.

Disclaimer: The designations employed and the presentation of material in this information product 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 or boundaries.
Cereal production in 2017 anticipated to remain at last year’s high level

Planting of the main 2017 cereal season is virtually concluded. Sowing operations benefitted from the good precipitation levels, even in the “dry corridor”. Continued provisions of agricultural inputs by the Government and an anticipation that rainfall levels will be normal, as the risk for an El Niño event has diminished, should maintain plantings at last year’s high level. FAO’s preliminary forecast, which assumes favourable weather conditions for the rest of the year, is for cereal output to reach almost 1.1 million tonnes in 2017, well above the country’s five-average.

Cereal imports forecast to sharply decline in 2017/18 marketing year

Cereal imports in the 2017/18 marketing year (September/August) are forecast to decline sharply from the high levels of the previous years when outputs were reduced by drought. The decline is being driven by ample cereal supplies, particularly of maize, due to the bumper 2016 crop. Imports may decline further for 2017/18 if crop yields for the current crop result as high as forecasted.

Prices of maize and beans remained at low levels in June

Reflecting the 2016 bumper maize crop and the good prospects for the 2017 first season crop, to be harvested from late August, prices continued their declining trend from the previous months in June and were some 37 percent below their level from a year earlier. Prices of red beans, the main staple, were stable in June after increasing the previous month, mainly reflecting imports. Prices, however, remained below their level from a year earlier.
Disclaimer: The designations employed and the presentation of material in this information product 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 or boundaries.
GIEWS Country Brief
El Salvador

Reference Date: 27-April-2017

FOOD SECURITY SNAPSHOT

- Sowings of main 2017 cereal season expected to remain at last year’s level
- Cereal production in 2016 recovered from last year’s drought-reduced level
- Cereal imports forecast to decline in 2016/17 marketing year (September/August)
- Prices of cereals and beans remained at low levels in March

Sowings of main 2017 cereal season anticipated to remain at last year’s level

Planting of the main 2017 cereal season is expected to start in mid-May, with the beginning of the rainy season. Continued provisions of agricultural inputs by the Government and an anticipation that rainfall levels will be normal should maintain plantings at last year’s high level. However, the high probability of an El Niño event during the June-August period has added some uncertainty for 2017 cereal outputs.

Cereal production in 2016 strongly recovered from last year’s drought-reduced level

Cereal production in 2016 has been preliminarily estimated at about 1.1 million tonnes, some 27 percent above the 2015 drought-reduced level and close to its record 2012 level. The increase in cereal output mainly reflects the recovery in rainfall levels in 2016 after two years of reduced precipitations due to the El Niño phenomena and strong support from the Government as it continued to facilitate access to main inputs, such as seeds and fertilizers. A strong recovery in maize and sorghum output, estimated at 900 000 tonnes and 141 000 tonnes, respectively, accounted for almost all of the increase in cereal production.

Cereal imports forecast to decline in 2016/17 marketing year

Cereal imports in the 2016/17 marketing year (September/August) are forecast to decline sharply from last year’s record level, reflecting the positive outlook for the 2016 cereal production. The bulk of the decline stems from lower maize imports, which are anticipated at 430 000 tonnes, down 38 percent year-on-year.
Prices of cereals and beans remained at low levels in March

White maize prices eased further in March, although at a slower pace than in the previous month, reflecting adequate market supplies, which kept prices more than 30 percent below their year-earlier levels. Prices of red beans, a main staple, remained unchanged in March, but still lower than a year earlier, also as a result of imports. Rice prices continued to decline for a second month in March and from a year earlier, reflecting adequate carryover supplies from the good 2016 harvests.

![Graph showing total cereal imports in El Salvador from 2011/12-2015/16, with averages for 2015/16 and 2016/17 forecast.](image)

Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing year.
Source: FAO/GEWS Country Cereal Balance Sheets

![Graph showing wholesale food prices in San Salvador.](image)

Source: Dirección General de Economía Agropecuaria, MAG
Cereal production in 2016 anticipated to recover from last year’s drought-reduced level

Cereal production in 2016 is forecast to reach 1 million tonnes, a 25 percent increase over last year’s drought-reduced level. The anticipated increase in cereal output mainly reflects a recovery in maize production. Harvest of the main “de primera” season, which represents some 60 percent of the annual maize output, concluded in October. Preliminary official estimates point to a good outcome for the season. Planting of the secondary crop also concluded in October and prospects are favourable, as weather conditions were good and farmers received inputs from the Government, including seeds and fertilizers. The official forecast for the maize crop production in 2016 point to 850 000 tonnes, a bumper level. The 2016 rice crop production is forecast to decline some 5 percent from last year’s good level and reach 37 000 tonnes, as the secondary season was affected by dry weather conditions. However, at this level, output will remain above average.

Cereal imports forecast to decline in 2016/17 marketing year

Cereal imports in the 2016/17 marketing year (September/August) are forecast to decline sharply from last year’s record level, reflecting the positive outlook for the 2016 cereal production. The bulk of the decline stems from lower maize imports for the 2016/17 marketing year (September/August), which are anticipated at 430 000 tonnes, down 38 percent year-on-year.

Maize and rice prices continued to decline in November, bean prices increased seasonally

Wholesale prices of white maize in November continued their declining trend of the previous months and were some 21 percent below their levels from a year earlier reflecting ample supplies from the good main season harvest concluded in October. Rice prices also declined from the previous month and from a year
earlier, as supplies from the main season harvest began to supply the markets. By contrast, bean prices increased seasonally, as the harvest of the main season crops will not begin until mid-December. However, prices remain some 17 percent below their year earlier levels, reflecting ample supplies from imports and carryover stocks from the harvest in November.
Cereal production in 2016 anticipated to recover from last year’s drought-reduced level

Cereal production in El Salvador is forecast to reach 1 million tonnes, a 25 percent increase over last year’s drought-reduced level. The anticipated increase in cereal output mainly reflects a recovery in maize production. Harvest of the main “de primera” season, which represents some 60 percent of the annual maize output, is ongoing and will conclude in early October. No official estimates are available for the first season crop, however, prospects are favourable, as precipitation during the season was close to historical levels. Planting of the secondary crop will begin from early October and prospects are also favourable, as weather conditions up to the second half of September have remained good and farmers are receiving inputs from the Government, including seeds and fertilizer. The official forecast points to a 2016 maize crop of 850,000 tonnes, a bumper level. The 2016 rice crop is forecast to decline some 5 percent from last year’s good level and reach 370,000 tonnes, as the secondary season was affected by dryness, however, at this level output will remain above average.

Cereal imports forecast to decline in 2016/17 marketing year

Cereal imports in the 2016/17 marketing year (July/June) are forecast to decline sharply from last year’s record level, reflecting the positive outlook for the 2016 cereal production. The bulk of the decline stems from lower maize imports for the 2016/17 marketing year (August/July), which are forecast at 475,000 tonnes, down 11 percent year-on-year.

Maize and bean prices declined moderately in September

Wholesale prices of white maize in September declined moderately with the beginning of the harvest. Prices remained

GIEWS Country Brief
El Salvador

Reference Date: 07-October-2016

FOOD SECURITY SNAPSHOT
- Cereal production in 2016 anticipated to recover from last year’s drought-reduced level
- Cereal imports forecast to decline in 2016/17 marketing year (July/June)
- Maize and bean prices declined moderately in September

El Salvador
Crop calendar (*major food crop)

<table>
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<th>Beans (Main)</th>
<th>Beans (Second)</th>
<th>Maize (Main)*</th>
<th>Maize (Second)*</th>
<th>Maize (Third)*</th>
<th>Rice (Main)</th>
<th>Rice (Second)</th>
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El Salvador
Cereal production

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<td>Maize</td>
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<tr>
<td>Sorghum</td>
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<td>Rice (paddy)</td>
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<tr>
<td>Others</td>
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<td>0</td>
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<td>Total</td>
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<td>870</td>
<td>1,028</td>
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</table>

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets
relatively below last year’s level as imports continued to supply the markets.

Prices of red beans, an important staple food, were moderately below their level from the previous month in September and well below their level for the same month a year earlier. The low price level mainly reflects ample supplies from imports as well as the entry of the new product from the first season harvest.

![El Salvador Total cereal imports](chart1)

**El Salvador**

**Total cereal imports**

<table>
<thead>
<tr>
<th></th>
<th>2011/12-2015/16</th>
<th>2015/16</th>
<th>2016/17 forecast</th>
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<td>Average</td>
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<td>988</td>
<td>820</td>
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</table>

Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. Source: FAO/GIEWS Country Cereal Balance Sheets

![El Salvador Wholesale food prices in San Salvador](chart2)

**El Salvador**

**Wholesale food prices in San Salvador**

![El Salvador - Agricultural Stress Index (ASI)](chart3)

**El Salvador - Agricultural Stress Index (ASI)**

from start of season 1 to dekad 2, September 2016

ASI measures the percent of cropland affected by drought per GAZ/L2 regions. The index calculation is based on METOP-A/HIRI data.
GIEWS Country Brief
El Salvador

Reference Date: 02-August-2016

FOOD SECURITY SNAPSHOT
- Cereal production in 2016 anticipated to recover from last year’s drought-reduced level
- Cereal imports forecast to decline in 2016/17 marketing year (July/June)
- Maize prices remained stable in May, while red bean prices fell

Cereal production in 2016 anticipated to recover from last year’s drought-reduced level
Planting of the main 2016 “de primera” season, mostly maize and rice, is underway, although somewhat later than normal. With rainfall levels below average in May, most likely still an impact of the recent strong El Niño event, which is now dissipating, the Government encouraged farmers to delay plantings until the beginning of June. Generally improved rainfall in the first dekad of June favoured planting activity, with the exception of southeast regions of the country where latest remote sensing data indicates that dry conditions still linger. Preliminary information points to a normal level of sowings should the favourable conditions continue.

Official forecasts, assuming a return to generally normal weather conditions throughout the growing season, point to a strong recovery in cereal production in 2016 compared to last year’s drought-reduced level, resting entirely on an expected increase in maize production that would offset lower sorghum and rice outputs. The decline in sorghum production is due to farmers switching back to maize following an increase in plantings of the more drought-resistant sorghum crop in 2015. The rice output is anticipated to remain at or slightly above-average levels. Total cereal production is forecast to reach 978 000 tonnes, close to the five-year average.

Cereal imports forecast to decline in 2016/17 marketing year (July/June)
Cereal imports in the 2016/17 marketing year (July/June) are forecast to decline sharply from last year’s record level, reflecting the positive outlook for the 2016 cereal production. The bulk of the decline stems from lower maize imports for the 2016/17 marketing year (August/July), which are forecast at 540 000 tonnes, down 11 percent year-on-year.

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<td>978</td>
<td>19</td>
</tr>
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Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets
Maize prices remained stable in May, while red bean prices declined

Wholesale prices of white maize in May remained relatively stable for the second consecutive month. Import flows, which continued to supply markets following the reduced production last year, and improved prospects for the 2016 main season cereal crops, currently being planted, contributed to the stability of prices.

Prices of red beans generally declined in May to levels that were well below a year earlier as imports and supplies from the 2015 harvests continued to keep markets well supplied.
GIEWS Country Brief
El Salvador

Reference Date: 30-December-2015

FOOD SECURITY SNAPSHOT
- Cereal production in 2015 reduced by drought for second consecutive year
- Cereal imports forecast at record level for 2015/16 marketing year (July/June)
- Maize and bean prices continue to decline in December

Cereal production in 2015 reduced by drought for second consecutive year
Cereal production in 2015 has been preliminarily estimated at 836 000 tonnes, some 14 percent below last year’s already drought-reduced output. For a second consecutive year the main “de primera” agricultural season (May/September) was significantly affected by a prolonged dry weather weather, associated with the El Niño phenomenon. Production of maize, the main cereal grown in the country, is estimated some 18 percent below last year’s level and well below the five-year average. To mitigate the production decreases, the Government has allowed increased maize imports at a zero tariff from outside the Central American region, mainly from the United States of America and Mexico. Similarly, rice production in 2015 is estimated to decrease by 4 percent from last year’s reduced level and some 13 percent less than the average.

Cereal imports forecast at record levels for 2015/16 marketing year (July/June)
Cereal imports in the 2015/16 marketing year (July/June) are forecast at 938 000 tonnes or 9 percent up from last year’s already high level. The increase is largely due to near-record maize imports, as a result of this year’s reduced output. Rice imports are expected to increase moderately, while wheat imports are set to remain stable at 260 000 tonnes.

Maize and bean prices continue to decline in December
Wholesale prices of white maize continued to decrease in December reflecting adequate availabilities from the recently completed main harvest and imports from Mexico, the subregion’s main producer, as well as imports from the United States of America. The onset of the second season maize harvest also added to the downward pressure. Prices, however, remained above their levels a year earlier, supported by the reduced first season outputs.

Bean prices in December continued to decline and were below their year-earlier levels. Ample availabilities from recent imports, and supplies from the 2015 first and second season harvests pushed red bean prices down to levels well below those of a year earlier.
Early estimates point to an increase in 2013 maize and bean production

Harvesting of the 2013/14 second “de postrera” and third “de apante” maize and beans seasons are virtually completed. Good outputs are anticipated due to favourable weather and the Government’s provision of supplemental technology packages in response to reduced yields of the main cropping season “de primera”, gathered until December last year, due to severe dry weather. Preliminary estimates point to an 2013/14 aggregate maize production of 953 000 tonnes, a new record level. Production of maize in the last two years has been increasing primarily due to the Government’s production support programmes, which consist in the distribution of improved seeds, fertilizers and the provision of extension services.

A good production of the 2013/14 bean crop is also expected. All three seasons (de primera, postrera, and apante) were favoured by relatively good weather. Like for maize, the Government has provided technology packages to support production. Preliminary official estimates point to an 8 percent increase in the output from 2012 to 127 000 tonnes.

Cereal imports forecast to rise in 2013/14 (July/June) on demand from feed sector

Cereal imports in the 2013/14 marketing year (July/June) are forecast to reach 750 000 tonnes or 8 percent up from last year’s reduced level. This increase has been revised downward from earlier projections due to better than expected production. The increase primarily reflects high demand for yellow maize from the feed industry. Wheat imports are also forecast to marginally increase.

Bean prices surged in February while maize prices remained low

Notwithstanding the increase in local bean production, prices in El Salvador surged 23 percent in February and were 18 percent higher than at the same time last year. Prices were supported by a significantly reduced regional output following poor bean crops in Nicaragua and Honduras, the country’s main suppliers of beans.

By contrast, wholesale white maize prices seasonally increased 5 percent from January but remained lower than in February 2013. The low maize price reflects the ample supplies in the market from last year’s bumper crop.
GIEWS Country Brief
El Salvador

Reference Date: 07-October-2013

FOOD SECURITY SNAPSHOT
- 2013 main season maize production decreases
- Coffee leaf rust continues to affect food security in rural areas
- Maize and bean prices at relatively low levels

2013 main season maize production decreases
Harvesting of the 2013 main season maize crop has concluded. The prolonged dry weather, known as the canícula, during the month of July, negatively affected yields particularly in the departments of San Miguel, Usulután and Unión, which together account for about 20 percent of national maize production. Preliminary estimates point to a 4 percent reduction in the main season maize production compared to the previous year. Sowing of the second “de postrera” season was completed in late September under favourable weather conditions. The Ministry of Agriculture delivered additional technology packages to the dry weather affected areas to sustain production during this season. Harvest prospects are generally good. Total 2013 maize production (“primera and “postrera”) is forecast to reach 900 000 tonnes, below last year’s record levels but still above average.

Coffee leaf rust continues to affect food security in rural areas
Coffee production was severely affected by the coffee leaf rust during the 2012/13 (October/March) season and early official forecasts point to a 36 percent decline in 2013/2014 coffee production with respect to the previous year. According to a preliminary assessment carried out by WFP in May, more than 65 000 farmers, who depend on the coffee sector as their main source of employment income, were affected by the coffee leaf rust. In response, food packages will be distributed until the end of November to 10 000 households.

Maize and bean prices at relatively low levels
In September, prices of maize and beans, the two main staple foods in the local diet, strengthened with respect to the previous month. The rise in prices is due to the effects of the canícula on the main season harvest. However, reflecting high supplies on the market, maize and bean prices are 3 and 30 percent below their levels of September 2012 respectively.
Cereal production expected to further increase in 2013

Sowing of the 2013 main season maize crop is on-going under favourable rainfall conditions. As part of the government’s programme to promote agriculture production, 375,000 technology packages consisting of improved seed and fertilizers are being distributed this season. This represents an increase of 21 percent from the last year’s support programme. Based on the expected higher use of agricultural inputs, and assuming normal weather conditions in the remaining of the cropping season, early forecasts point to a 2013 aggregate maize production of 950,000 tonnes or almost 2 percent above the record level of 2012. Official estimates put the 2012 aggregate cereal output, including maize, sorghum and rice, at 1.1 million tonnes, an increase of 19 percent from the previous year.

Coffee leaf rust affects incomes in rural areas

Coffee production was severely affected by the coffee leaf rust during the 2012/13 (October/March) season. About 74 percent of the total area cultivated was affected and production is officially estimated to have declined by 18 percent from the previous season to 69,600 tonnes. Forecasts for the 2013/14 season point to even greater losses as a result of the number of plantations which will need to be eliminated in order to control the spread of the disease.

Like in the rest of Central America, the coffee sector represents one of the major sources of employment in rural areas and of income for small farmers. Official assessments indicate a reduction of 15 percent in the work force during the 2012/13 coffee season and the figure is likely to increase in 2013/14. The Government has invested 3 million US dollars to assist 17,342 coffee growers under the integrated coffee leaf rust control programme that has a planned duration of 12 months. Under the programme, farmers will be supplied with coffee leaf rust control packages, consisting of agro-chemicals and spraying equipment, together with technical assistance and training.
Cereal imports increase slightly in 2012/13 (July/June)

Based on official estimates until March 2013, imports of cereals in 2012/13 marketing year (July/June) are forecast to increase by 3 percent from their levels of the previous year. Despite the 2012 bumper maize crop, imports are anticipated higher reflecting the sustained demand from the feed industry. Imports of wheat, not produced in the country, are also expected significantly above the 2011/12 level.

Maize and bean prices at low levels

After remaining stable until May reflecting abundant supplies from the 2012/13 maize record harvest, prices of white maize strengthened in the first half of June with the beginning of the lean period. Overall, however, maize prices remained well below their levels of a year earlier. Bean prices continued their declining trend for a ninth consecutive month and were 41 percent lower than in May 2012. The sharp decline reflects the bumper harvest of 2012/13 which reached a historical high of almost 99 000 tonnes or two thirds higher than last year.
Early prospects for the 2012 main season cereal crops are favourable

Sowing of the main 2012 cereal crop, particularly maize, is currently under way. Following a weakening of the la Niña phenomenon in April, generally normal weather conditions are expected during the cropping season. Although rainfall in the first decade of May was below average, weather forecasts suggest that precipitation will be favourable and very close to the average during the growing period. In an effort to promote production in this agricultural season, in April the Government started to distribute 315,000 agricultural input packages, which include white maize seed and fertilizers, as part of the subsidy paid each year to farmers. With this assistance, and favourable rainfall prospects for the next few months, a record output of 1 million tonnes is expected, similar to the projection for the 2011 harvest which was not gathered because of unfavourable weather conditions.

Cereal import requirements decrease in the 2011/12 (July/June) marketing year

Cereal production in 2011 is estimated to have risen by 3 percent compared to the lower level in 2010. In particular, the maize output amounted to 786,000 tonnes, which is close to the average production level. Cereal import requirements are expected to decline by 5 percent in the 2011/12 (July/June) marketing year, compared to the previous year, at a level close to the average of the last five years.

Maize and bean prices much lower than a year ago

In the market of the capital city, San Salvador, maize prices have stabilized at relatively low levels in the past two months, having dropped sharply in the second half of 2011 when the main harvest came in. In April 2012, maize prices were 17 percent lower than a year earlier. In addition, red bean prices have declined sharply from the peak of June 2011; and, despite a slight rise, in April 2012 they were 41 percent lower than twelve months before. By contrast, rice prices have remained relatively stable throughout 2011 and in the first few months of 2012; and in April they were 6 percent higher than a year earlier.
El Salvador
Selected retail food prices in San Salvador
USD per Kg

Source: Dirección General de Economía Agrícola
GOOD GRAIN PRODUCTION IN 2011 DESPITE LOSSES CAUSED BY TORRENTIAL RAINFALL IN OCTOBER

The 2010-11 second and third season crops (the “de postrera” and “de apante” seasons) are currently being harvested under favourable weather conditions. Last October the country was hit by tropical depression 12-E, which brought torrential rainfall causing localized crop losses in the “de postrera” season. Estimated losses include 16,000 tonnes of beans and 45,000 tonnes of maize (6 percent of annual production), as well as 10,000 tonnes of sorghum and 4,000 tonnes of rice. To mitigate the impact of these losses, the Government provided incentives for re-sowing maize and beans by making agricultural inputs available. This should make it possible to harvest additional 24,000 tonnes of maize and 3,900 tonnes of beans. As a result of the re-sowing and good harvest obtained in the main season, total maize production in 2011 (main, second and third seasons) is forecast at 786 million tonnes, slightly above both last year’s level and the average of the last five years.

FAO launched a program to support farmers affected by the rains, by providing bean and vegetable seeds, fertilizers, insecticides and metal containers for food storage, for a total value of USD 400,000.

The Government also authorized duty-free importation of 2300 tonnes of maize and 1,150 tonnes of beans, to guarantee supplies to the population and keep prices stable on local market.

CEREAL IMPORT REQUIREMENTS TO DECLINE IN 2011/12 (JULY/JUNE)

Cereal import requirement for 2011/12 marketing year (July/June) are forecast at 757,000 tonnes or 5 percent below last year’s level as a result of the higher output estimated in 2011.

PRICES OF BASIC FOODS AT RECORD LEVELS

In the national capital, San Salvador, maize and bean prices decreased from their mid-2011 record levels, from September onwards as the 2011 main harvest came in. Prices then dropped further in the new year, in the wake of the government’s re-sowing programmes; and in January 2012, bean prices were 44 percent below their January 2011 levels. In the case of maize, of which 40 percent of domestic consumption is imported, prices in January were around the
Rice prices have remained virtually unchanged over the last two years.
FOOD SECURITY SNAPSHOT

- Uncertain prospects for the sowing of the 2011 first season cereal crops
- Excessive rainfall reduced 2010 maize and bean production
- Prices of maize and beans at record levels

Sowing prospects uncertain for cereal crops of the 2011 main season

Sowing of the 2011 main cereal crops has begun. After the weakening of the La Niña phenomenon, from February to April, a return to normal conditions is forecast for the next few months. The rainy season began as normal in mid-May, but rainfall has been irregular and below average, leading to losses of crops, especially maize, sown early. In order to encourage production during the season, the Government is supplying seeds and fertilizers to 325,000 vulnerable families but more rainfall is needed to avoid further losses and reseeding.

Significant reduction in cereal production in 2010

During the 2010/11 “primera” and “postrera” agricultural seasons, excessive rainfall was recorded due to the passage of tropical storms Agatha and Matthew. The Ministry of Agriculture reported losses of USD 96.3 million in the agricultural and livestock farming sectors, USD 69 million of which was due to the losses of basic grains. Total production of cereals is estimated to be 9 percent lower than in 2009 and 11 percent lower compared to the average for the last five years. In particular, sorghum production experienced a significant decline due to excessive humidity - an estimated 37 percent reduction compared to average production over the last five years. Bean crops were one of the crops most affected by the excessive humidity throughout 2010.

Prices of basic foods at record levels

In March 2011, prices of maize and beans, the country’s basic foods, reached record levels and were 40 percent higher than in March 2010. The increase in the price of maize is due to the reduced 2010 harvest and the high prices on the international market. In addition, prices of beans in March were 133 percent higher than last year although they fell from the record levels reached in November 2010. As regards beans, in addition to the reduced yield in 2010, the increase in prices reflects the reduced harvest throughout the Central American region, and particularly Nicaragua, the main exporter in the subregion.
El Salvador

Selected retail food prices in San Salvador
USD per kg

- Maize (white)
- Rice
- Beans (red)

Source: Dirección General de Economía Agropecuaria
FOOD SECURITY SNAPSHOT

- Cereals and beans of the 2010 second season have been harvested.
- The damages caused by excessive rainfall to maize and bean crops in 2010 led to increased prices in local markets.
- It is likely that the sowing of crops in the first season of 2011, which will take place in May/June, will continue to be affected by the La Niña phenomenon.

La Niña will continue to affect the sowing of the 2011 first season crops

The main crops of the 2010 second season have been harvested and minimal agricultural activities take place in March. It is predicted that the sowing of crops in the first season of 2011, which will begin in April/May, will continue to be affected by the La Niña phenomenon. Although the phenomenon has started to ease off, above average and irregular rainfall is forecast for the months in which the first season's crops are sown.

Significant reduction in cereal production in 2010

The country suffered the consequences of the tropical storms Matthew and Agatha during the first and second agricultural seasons. The Ministry of Agriculture reported losses of USD 96.3 million in the agricultural and livestock farming sectors, USD 69 million of which was due to the loss of basic grains. It is estimated that the total production of cereals in 2010 will decline by 9 percent compared to 2009 and 11 percent compared to the average of the last five years. In particular, sorghum production experienced a significant decline due to excessive humidity - an estimated 37 percent drop compared to the average production over the last five years. Bean crops were severely affected by the excessive humidity in 2010.

Increased import of basic grains compared to 2009

A slight increase is estimated in the importation of basic grains in the 2010/11 marketing year (August/July) compared to the levels imported in the previous year. The country also normally imports 30 percent of the red beans it consumes, from Nicaragua in particular. This year, the Government has confirmed the importation of 4 500 tonnes of red beans from China.

Sharp increase in the price of red beans

A 150 percent increase in the price of red beans compared to its price in 2010 was recorded in the San Salvador local market. This sharp increase is due to the low production of this crop across Central America, and particularly in Nicaragua, which supplies the bulk of the country’s bean imports. The price of maize also suffered a significant increase by 32 percent between January 2010 and January 2011. Rice is the only food staple whose price remains stable.
El Salvador
Selected retail food prices in San Salvador
USD per kg

Source: Dirección General de Economía Agrícola y Pesquera.
FOOD SECURITY SNAPSHOT

- Heavy rainfall due to hurricanes followed by dry spell in October affected crops
- Near average 2010 cereal production
- Bean production seriously affected by water logging followed by dry spell
- Sharp increase in red bean prices

Coastal and Central valley regions have been affected by excessive rainfall

Heavy rainfall during the first cropping season, from last summer, has produced water logging mainly in the Coastal and Central valley regions, affecting the moisture condition of the harvested maize and mainly bean crops. Farmers have reported approximately 10-15 percent maize-cob damage due to high moisture content. Infrastructure, main roads have also been affected seriously.

Good cereal harvest in 2010

Despite the heavy rainfall levels due to very active hurricane season, the maize production is estimated to be 18 percent above the 5-years average national maize production. Near average rice production is also expected in 2010. However the beans production, which also constitutes part of the staple diet, was affected in the first half of the cropping season by excess water and by dry spell during the flowering phase.

Imports of basic grains in 2010 are forecast to increase compared to the previous year

Imports of basic grains in 2010 are estimated at 630 000 tonnes, 7 percent above the previous year. The increase is mainly due to bigger import requirements of maize to offset production losses in 2009 due to adverse weather conditions.

Sharp increase of red beans price

A sharp increase was observed in red bean prices in San Salvador since last summer due to the poor 2010 bean production in the country and in the rest of Central American countries. In San Salvador, the average monthly retail price of beans during October 2010 was 2.41 USD/Kg, which is more than double the level of one year ago.
El Salvador
Selected retail cereal prices in San Salvador
USD per kg

Source: Dirección General de Economía Agropecuaria
GIEWS Country Brief
El Salvador

Reference Date: 1-October-2010

**FOOD SECURITY SNAPSHOT**
- Severe rainfall caused widespread damage and forced more than 2,000 people to be evacuated.
- Harvesting of the main “primera” season crops is complete or well advanced; prospects are unfavourable for beans.
- Prices of red beans increased by more than 15 percent from July to August 2010.

Heavy rains caused widespread damage in the coastal and central valley regions.

A yellow alert was declared by the government on 24 September 2010 across the country while the orange alert is maintained for the coastal and central valley regions and the red alert for the areas in lower parts of watersheds where the saturation of soils, due to the intense rainfall of recent weeks, is causing waterlogging.

According to official reports, more than 2,000 people have been forced from their homes and are currently receiving humanitarian assistance. Damage to infrastructure is also severe with 14 major interdepartemental roads and 5 bridges reported to have been destroyed.

**Harvesting of 2010 main cropping season is almost complete with favourable prospects for maize**

Despite the unfavourable weather conditions brought by the particularly active hurricane season this year, the national association of producers of basic grains (PROGRANO) ensured that there will be sufficient availability of maize, the principal staple of vulnerable groups in El Salvador. Harvesting of the main (primera) maize crop is nearing completion and preliminary estimates point to a production, of the primera season, of 592,000 tonnes which, if confirmed, would represent an increase of more than 8 percent compared to the good primera harvest of 2009.

Unlike the maize crop, widespread losses are reported for the primera season bean crops that are more sensitive to excess water and waterlogging.

**In 2010 imports of basic grains are forecast to increase on last year**

Imports of basic grains in 2010 are estimated at 630,000 tonnes, 7 percent above the previous year. The increase is mainly due to the augmented import requirements of maize to offset 2009 production losses caused by adverse weather conditions.

**Maize and rice prices increase to their levels of two years ago**

Following a stable trend that lasted since November 2009, where red beans quotations on the market of San Salvador were similar to pre-crisis level, prices have started to increase again since April. In particular red beans price rose by 15 percent between June and August 2010.
alone. This sudden increase prompted the government to meet with the representatives of the private sector to plan a strategy of price control in the following months. However, according to the Ministry of Agriculture, the limited deficit of red beans on the local market does not justify the skyrocketing price and calls traders not to hoard the commodity.

Quotations of white maize continued to remain stable, in line with the trend of prices in international markets while price levels of the wheat flour in July, was back to pre-crisis levels.

A significant growth in foreign remittances has been recorded in 2010

The Central Reserve Bank (BCR) reported that the country received about USD 2.08 million in remittances in the seven months till July 2010, registering an increase of 2.5 percent compared to January-July 2009.
FOOD SECURITY SNAPSHOT

- Imports are expected to increase due to maize and beans losses in 2009
- Prices of most important staple food are back to the level of two years ago

Heavy rains are expected at the end of April

Rainfall was generally close to average during March and part of the current month, whereas for the remainder of April, the National Weather Service forecasts abundant precipitation in the Northern part of the Western region. However, the amount of accumulated rainfall, from May to July, is expected to be below the seasonal average in most parts of the country.

Planting of 2010 main cropping season is about to start

Under generally good conditions, field work for the sowing of the 2010 cereal and bean crops is underway. Planting should begin with the imminent arrival of the first rains in May. If weather conditions will be favourable with a timely start of the rainy season, the sowed area with maize is expected to be similar to the area planted in 2009.

To support the recovery of agricultural production in areas affected by the storm Ida at the end of 2009 and in the framework of the Sistema de Protección Social Universal, the Government continues to distribute packages benefiting small scale agricultural producers.

The total area sowed with rice and beans crops is also expected to be on average.

In marketing year 2009/10 imports of basic grains are forecast to increase

Imports of basic grains in marketing year 2009/10 are estimated at 630,000 tonnes, 7 percent above the previous year. The increase is mainly on account of the augmented import requirements of maize to offset 2009 production losses caused by adverse weather conditions.

Beans prices are declining sharply from mid-2008. Maize and rice quotations are back to the level of two years ago

The price of rice in the market of San Salvador has dropped considerably since September 2009 as a result of the expectations for a good rice output from the rice main cropping season. In February 2010, the price is at the same level of two years ago. Similarly, quotations of red beans have been constantly decreasing since mid-2008 when they were more than 50 percent higher compared to the level of February 2010. Despite the reduced 2009 production, the good availability of red beans from Honduras and Nicaragua, which should have enough surpluses for export, are maintaining the price low.

Quotations of white maize continued to remain stable in line with the...
trend of prices in international markets.
FOOD SECURITY SNAPSHOT

- Low rainfall level could hamper maize production
- Good production prospects for beans in 2009
- Retail prices for beans show a positive downward trend

The drought may depress maize output

Despite the heavy rainfall which has been causing landslides and damage throughout the country in recent days, the total volume of rainfall in the past two months still remains far below normal levels throughout the North and in most of the interior valleys in the East and West, destroying almost 120 000 tonnes of crops nationwide.

In the eastern and western zones, which have been most seriously affected by the lack of water, the Ministry of Agriculture (MAG) has put losses at 10 and 25 percent, respectively, in these two zones.

Compared with the initial sowing forecasts of 306 000 hectares nationwide it is now predicted that this figure will fall by about 12 percent, taking account of the 39 000 hectares damaged to varying degrees.

Rice: no damage reported

According to the MAG, the rice harvest is guaranteed because it is sown in the Irrigation Districts, mainly in Atiocoyo Norte and Atiocoyo Sur both of which are in the north of the Department of La Libertad and the west of the Department of Chalatenango.

Fresh investment in bean farming

With an MAG investment of USD 8.7 million, more than 160 000 farmers have been supplied with bean seed.

This will make it possible to expand the areas sown and raise bean production to 140 000 tonnes for the current agricultural cycle.
No concern about staple food prices

Bean retail prices are continuing their downward trend from peaking in July 2008 at USD 2.33 and are gradually stabilising at roughly around the 2008 pre-food crisis levels.

The country is investing in bean cultivation, by implementing seed and fertiliser supply programmes, and production is expected to rise.

In the past two years, white maize prices have undergone seasonal fluctuations reaching USD 354/t in August this year.