



GIEWS Country Brief The Eastern Republic of Uruguay

Reference Date: 17-July-2023

FOOD SECURITY SNAPSHOT

- Official forecast points to above-average sowings of 2023 wheat crop
- Dryness-stricken 2023 maize production estimated well below average
- Cereal exports in 2023/24 marketing year forecast at high levels
- Prices of maize rose between April and June 2023 to levels 10 percent higher year-on-year

Official forecast points to above-average sowings of 2023 wheat crop

Planting operations of the 2023 wheat crop are ongoing and the area sown is officially forecast at 301 000 hectares, about 25 percent above the previous five-year average. The large area sown is the result of some farmers opting to plant wheat rather than rapeseed, due to the delayed harvesting operations of precedent maize and soybean crops that shortened the growing season for rapeseed. According to satellite imagery, germinating crops are in good conditions in the main producing western region (VCI Map). Weather forecasts indicate above-average rainfall amounts in the October-December period, which coincides with crop maturation and harvesting. If excessive rains materialize during this period, it could lower crop yields and hamper harvesting operations, with negative effects on production.

Dryness-stricken 2023 maize production estimated well below average

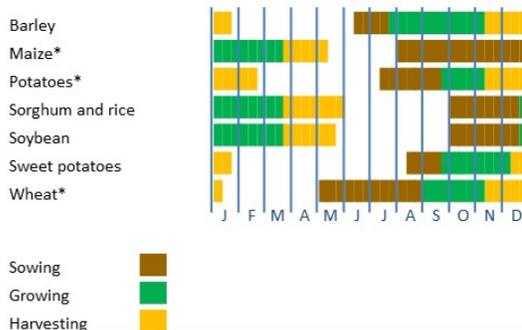
Despite the above-average planted area, which was more than 20 percent up from a year earlier, 2023 maize production is officially estimated at 266 000 tonnes, over 60 percent below the five-year average. With more than 90 percent of planted area to maize crop being rainfed, prolonged drought conditions between October 2022 and February 2023 caused significant crop losses. The government declared an Agriculture and Livestock Emergency in October 2022 (Ministerial Resolution 958/2022), which [was extended in 24 April 2023](#) for a period of 150 days.

By contrast, paddy production is officially estimated at 1.37 million tonnes, 8 percent above the average, due to above average yields. Dry weather conditions did not affect paddy crops, as they are entirely cultivated under irrigation.

Uruguay

Crop Calendar

(*major foodcrop)



Uruguay

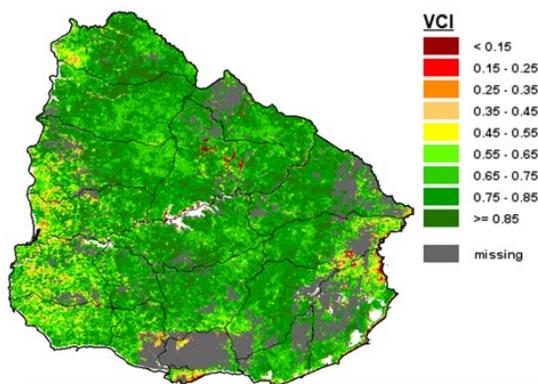
Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Rice (paddy)	1 274	1 391	1 373	-1.3
Wheat	939	1 283	1 165	-9.2
Barley	790	897	770	-14.2
Others	852	995	313	-68.6
Total	3 855	4 567	3 621	-20.7

Note: Percentage change calculated from unrounded data.

Uruguay - Vegetation Condition Index (VCI)

June 2023



Cereal exports in 2023/24 marketing year forecast at high levels

Cereal exports in the 2023/24 marketing year (April/March) are forecast at nearly 1.9 million tonnes, more than 20 percent above the five-year average. This reflects an ample exportable surplus of rice, which account for about 55 percent of the total annual cereal exports, following the bumper paddy harvest in 2023.

Cereal import requirements are forecast to increase sharply in 2023/24 due to the decline in maize production. Maize imports during the first five months of 2023, mostly from Paraguay and Argentina, were more than double the average of the same period.

Prices of maize rose between April and June to levels 10 percent higher year-on-year

Wholesale prices of maize soared in the April-June period, as the drought-induced decline in production more than offset seasonal downward pressure from the recently completed harvest. As of June 2023, maize prices were 10 percent above their year-earlier levels.

In the first half of 2023, prices of wheat grain weakened modestly, with markets well supplied by the above-average output harvested in 2022. Prices in June were more than 20 percent below their high levels a year earlier, when the upsurge in international quotations following the onset of the war in Ukraine was transmitted to domestic prices.

After a short-lived increase last May, prices of rice resumed the declining trend in June, which have been observed since February 2022, as a result of bumper harvests in 2022 and 2023. Prices in June were 6 percent lower year-on-year.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

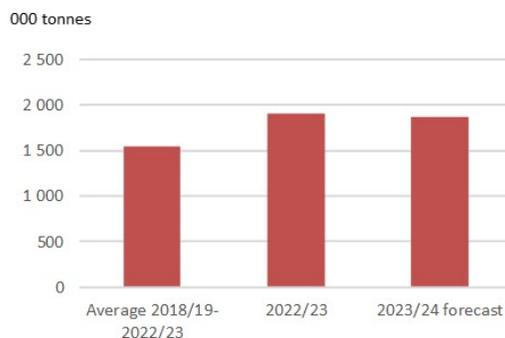
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

Uruguay

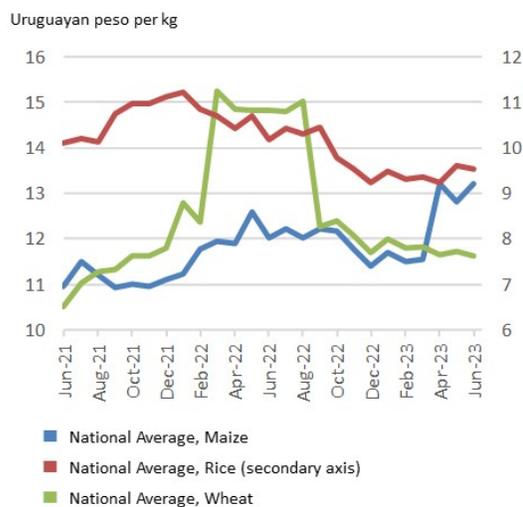
Cereals Exports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

Uruguay

Wholesale prices of cereals





GIEWS Country Brief Uruguay

Reference Date: 07-October-2022

FOOD SECURITY SNAPSHOT

- Production prospects for 2022 wheat crop favourable due to large sowings and good crop conditions
- Planting of 2023 paddy and maize crops ongoing
- Cereal exports in 2022/23 marketing year forecast at high levels
- Prices of wheat grain at very high levels in August 2022

Production prospects for 2022 wheat crop favourable due to large sowings and good crop conditions

Harvesting of the 2022 wheat crop will start in November and the planted area is officially estimated at 288 000 hectares, more than 30 percent above the five-year average. High prices of wheat and adequate soil moisture levels at planting time instigated farmers to increase sowings. Vegetation conditions are favourable (green areas on NDVI Anomaly map) in the western producing area, bolstering production prospects. Although weather forecasts point to below-average rainfall amounts in the October-December period, production prospects are expected to remain favourable as wheat crops are relatively tolerant to water stress during the maturity stage.

The 2022 barley crop will also be harvested in November and its area sown is officially estimated at a near-average level. After increasing sharply during the last two years, barley plantings declined year on year in 2022 at the expense of wheat and rapeseed.

Production of the 2022 paddy crop is estimated at 1.4 million tonnes, nearly 10 percent above the five-year average due to above-average yields. Production of the 2022 maize crop is officially estimated at a well above-average level of 878 000 tonnes, reflecting large sowings which were driven by high prices at planting time. The 2022 aggregate cereal output is anticipated at 4.3 million tonnes, about 20 percent above the five-year average.

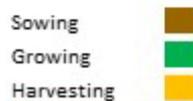
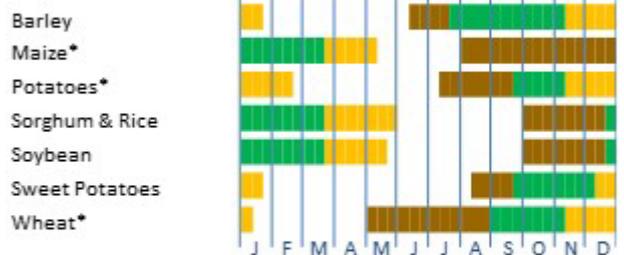
Planting of 2023 paddy and maize crops ongoing

Planting operations of the 2023 paddy and maize crops are ongoing. The producers' rice association forecasts that the 2023 planted area will decline to a near-average level owing to the

Uruguay

Crop Calendar

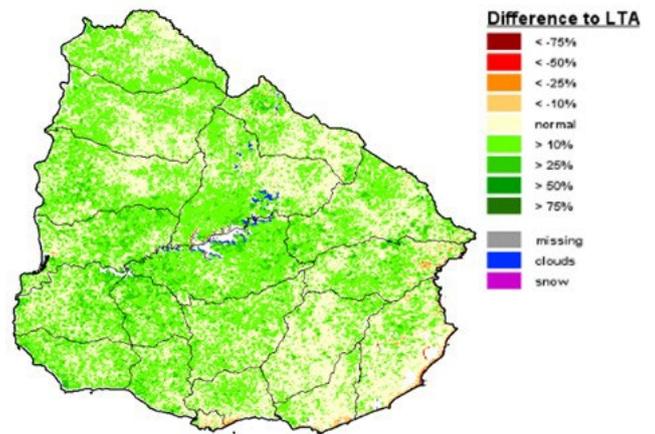
(*major foodcrop)



Source: FAO/GIEWS.

Uruguay - NDVI anomaly

Relative difference to Long Term Average - Dekad 2, September 2022



Source: FAO/GIEWS Earth Observation System.

year-on-year decline of prices and elevated production costs. Planted area with maize is also forecast to decline from the 2022 high level, but it is likely to remain at an above-average level due to generally high prices.

Weather forecasts indicate a high likelihood of below-average rainfall amounts in the last quarter of 2022. This is likely to have negative effects on germination and development of crops, especially for the predominantly rainfed maize.

Cereal exports in 2022/23 marketing year forecast at high levels

Cereal exports in the 2022/23 marketing year (April/March) are forecast at an above-average level of 1.9 million tonnes, the highest level recorded since 2013/14. The expected large export volumes of rice and wheat, which account for about 85 percent of the total annual exports of cereals, reflect ample exportable availabilities from the 2022 bumper harvests as well as strong international demand.

Prices of wheat grain at very high levels in August 2022

Domestic prices of wheat grain soared in March 2022, mainly reflecting the sharp increase in foreign demand, amid concerns over the impact of the conflict in Ukraine on global wheat supplies. Exports of wheat in February and March 2022 were more than double, compared to the average of the same period in 2019-2021. Since April, prices have remained virtually unchanged at levels more than 30 percent higher than the year before.

Prices of rice and maize were overall steady in the third quarter of 2022 due to adequate market supplies and stable exchange rates. Prices of most food items were higher year on year as indicated by the annual inflation rate of food and non-alcoholic beverages, estimated at 11.4 percent in August 2022.

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Uruguay

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Rice (paddy)	1 278	1 309	1 391	6.3
Wheat	771	974	1 005	3.2
Barley	688	920	800	-13.0
Others	797	914	997	9.2
Total	3 533	4 117	4 194	1.9

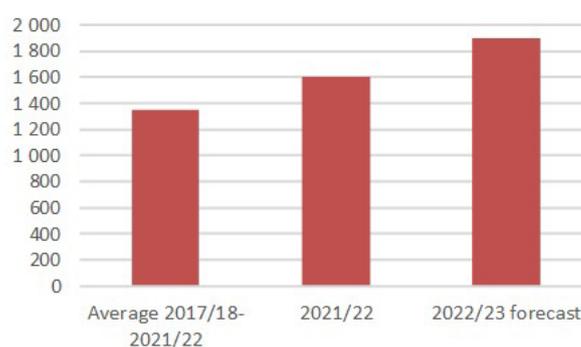
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Uruguay

Cereals Exports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals

Uruguayan peso per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Uruguay

Reference Date: 28-October-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2021 anticipated well above average
- Planting of 2022 paddy and maize crops ongoing
- Cereal exports in 2021/22 marketing year forecast at high levels
- Cereal prices on steady rise and very high levels in September 2021

Cereal production in 2021 anticipated well above average

Harvesting of the 2021 wheat and barley crops will start in November and production prospects are generally favourable. Planted area with the wheat crop is officially estimated at 237 000 hectares, about 10 percent above the previous five-year average, instigated by high price levels. Similarly, barley sowings are estimated at record highs. Vegetation conditions are favourable (NDVI Anomaly map) in the producing western area, supported by adequate rainfall amounts in the April to September period.

Production of the 2021 paddy crop is officially estimated at an average level of 1.3 million tonnes. This is due to above-average yields that more than offset a contraction in plantings. Planted area with paddy has been declining since 2011 due to low financial gains for farmers. The 2021 maize crop is officially estimated at 770 000 tonnes, 35 percent higher than the average, mainly reflecting large sowings.

The 2021 aggregate cereal output is anticipated at 4.1 million tonnes, about 20 percent above the five-year average.

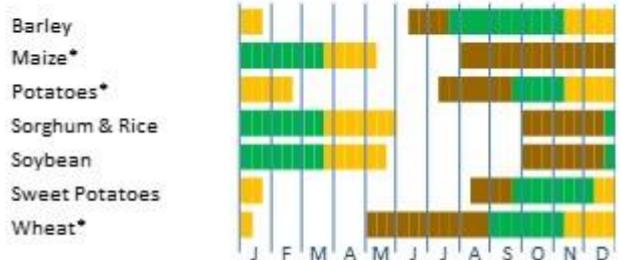
Planting of 2022 paddy and maize crops ongoing

Planting operations of the 2022 paddy and maize crops are ongoing. The producers' rice association of forecasts that the 2022 planted area will increase to an above-average level of 165 000 hectares due to high prices of the grain and adequate irrigation water in most reservoirs. Planted area with maize is also forecast at an above-average level as elevated prices have encouraged farmers to expand the area sown. Weather forecasts indicate a high likelihood of below-average rainfall amounts in the November 2021 to January 2022 period. This is likely to have negative effects on germination and crop development, especially for the predominantly rainfed maize crop.

Uruguay

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Uruguay

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Rice (paddy)	1 277	1 209	1 309	8.3
Wheat	727	936	970	3.6
Barley	639	889	920	3.5
Others	768	910	929	2.0
Total	3 411	3 945	4 128	4.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal exports in 2021/22 marketing year forecast at high levels

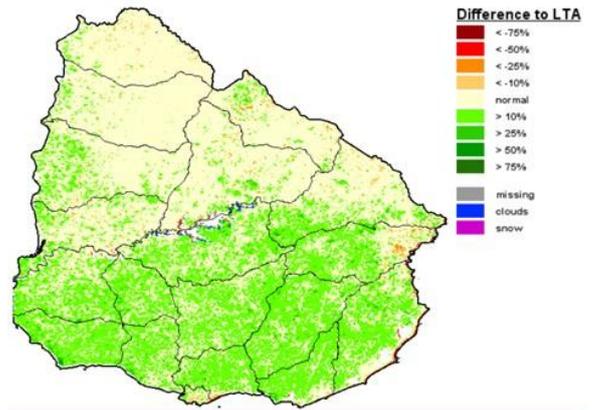
Total cereal exports in the 2021/22 marketing year (April/March) are forecast at an above-average level of 1.45 million tonnes. Exports of rice, the country's major exportable crop, are anticipated at below-average levels due to a weakened international demand. Exports of wheat are likely to remain at high levels, reflecting the bumper harvest obtained in 2021.

Cereal prices on steady rise and very high levels in September 2021

Prices of cereals have been increasing from the beginning of 2020 and, as of September 2021, they were at very high levels. This mainly reflects high production and transportation costs, which stem from elevated international prices of agricultural inputs and fuel. A weakening of the national currency in early 2020 also contributed to increasing costs of imported inputs. The upward trend in the international market exerted additional pressure on prices. Prices of wheat and rice increase between June and September in line with seasonal trends. Prices of yellow maize declined in September for the second consecutive month but remained up from a year earlier. Overall, prices of most food items were higher year on year, as indicated by the annual inflation rate of food and non-alcoholic beverages, estimated at 6 percent in September 2021.

Uruguay - NDVI anomaly

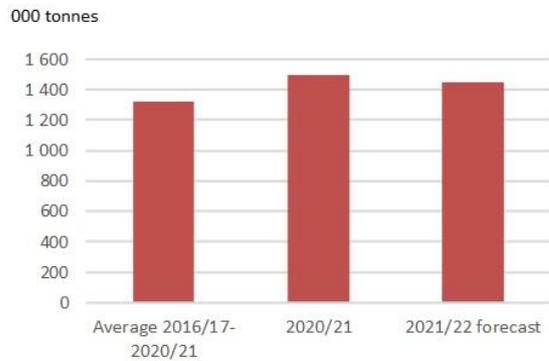
Relative difference to Long Term Average - Dekad 1, October 2021



Source: FAO/GIEWS Earth Observation System.

Uruguay

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Uruguay

Reference Date: 13-May-2021

FOOD SECURITY SNAPSHOT

- Cereal production in 2021 forecast at record high
- Cereal exports in 2021/22 marketing year anticipated at high levels
- Cereal prices in April 2021 above year-earlier levels

Cereal production in 2021 forecast at record high

Harvesting of the 2021 paddy crop is ongoing and production is officially anticipated at a near-average level of 1.3 million tonnes. The planted area remained below the previous five-year average, but it was slightly higher than the 2020 low level as a response to the high prices at planting time. Crop yields are expected at near-record levels due to improved weather conditions during the first quarter of 2021.

The harvest of the 2021 maize crop is nearing completion and the output is expected at a well above-average level of 880 000 tonnes reflecting record plantings. Yields of the early planted crops are estimated at below-average level due to dry weather conditions between November and December 2020. Increased rainfall amounts since mid-January favoured late planted crops at flowering and grain filling stages, improving crop yields.

Planting of the 2021 wheat crop has recently started under adequate soil moisture conditions in the key producing western region. Although there is no official forecast, high domestic prices are likely to prompt farmers to expand sowings. The weather forecasts indicate a high probability of average precipitation amounts in the June-August period, providing conducive conditions for crop germination and flowering.

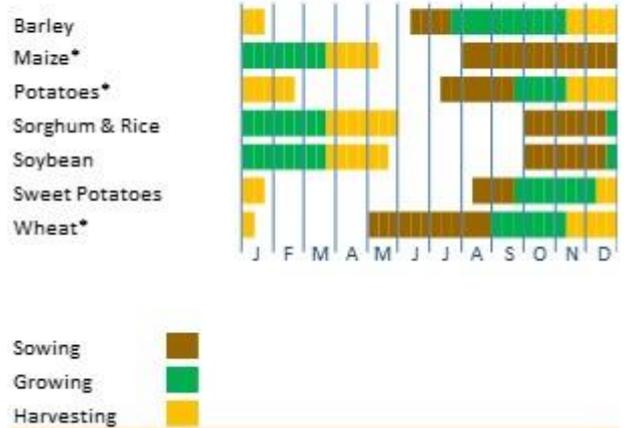
Cereal exports in 2021/22 marketing year anticipated at high levels

Total cereal exports in the 2021/22 marketing year (April/March) are forecast at an above-average level of 1.5 million tonnes. Exports of rice, the country's major exportable crop, are forecast at average levels. If the expected large planted area of wheat results in good 2021 harvests, exports of wheat are likely to remain at high levels for the second consecutive year.

Uruguay

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Uruguay

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Rice (paddy)	1 277	1 209	1 300	7.5
Wheat	727	936	950	1.5
Maize	569	763	880	15.3
Others	838	1 037	1 049	1.2
Total	3 411	3 945	4 179	5.9

Note: percentage change calculated from unrounded data.

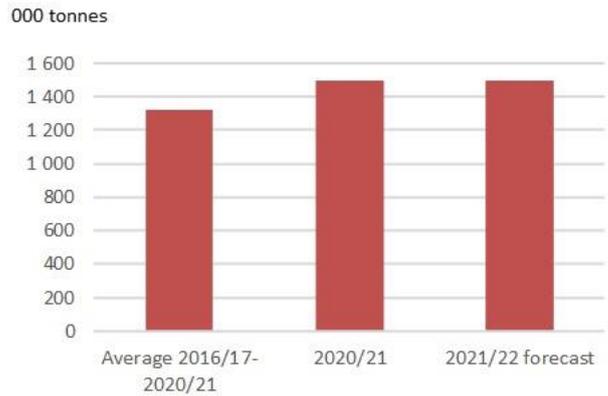
Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal prices in April 2021 above year-earlier levels

After having been generally stable since August 2020, prices of rice declined seasonally in April. Prices were more than 10 percent above their year-earlier levels, as high export prices contributed to an increase in price levels in the domestic market. Prices of yellow maize started to decline since March, as the 2021 harvest increased market supplies. They were about 20 percent higher year on year, following trends in the international market, which have exerted the significant upward pressure on prices between November 2020 and February 2021. Similarly, prices of wheat grain were also up from a year earlier.

Uruguay

Cereals Exports

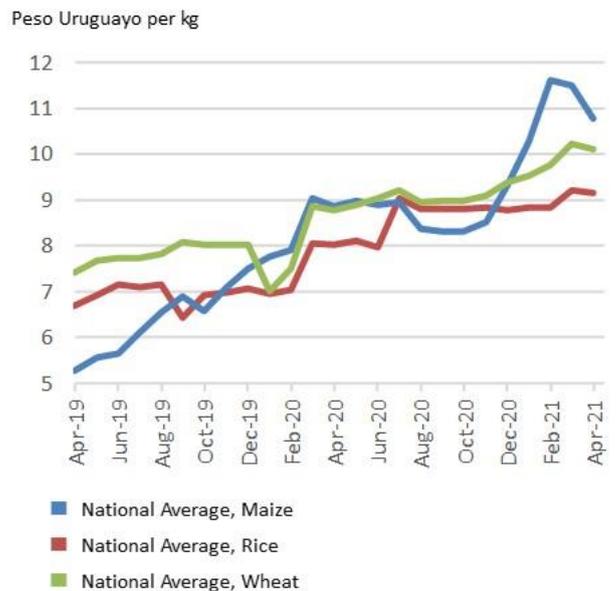


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Uruguay

Reference Date: 23-October-2020

FOOD SECURITY SNAPSHOT

- Cereal production in 2020 forecast at above-average level
- Planting of 2021 paddy crop ongoing under dry weather conditions
- Cereal exports in 2020/21 marketing year forecast at below-average levels
- Cereal prices in September 2020 higher year on year

Cereal production in 2020 forecast at above-average level

The 2020 wheat crop is currently at grain filling stage and production is forecast at 745 000 tonnes, slightly lower than the previous five-year average due to a contraction in plantings. The planted area is officially estimated at a slightly below-average level, as farmers preferred to plant other winter crops, such as rapeseed or barley, prices of which were more remunerative during the planting period. According to satellite imagery, despite the slightly below-average precipitation between July and September 2020, vegetation conditions are average.

The harvest of the 2020 barley crop is about to start in November. Due to the near-record planted area, production is expected at a well above-average level. Sowings increased sharply in 2020 reflecting the strong demand by the beer industry. Currently, yields are reportedly to be above average as barley is more resistant to dry weather conditions than wheat.

The aggregate cereal production in 2020, including paddy and maize crops harvested in May, is forecast at 3.5 million tonnes, slightly above the previous five-year average due to above-average barley and maize crops.

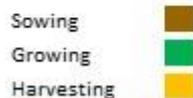
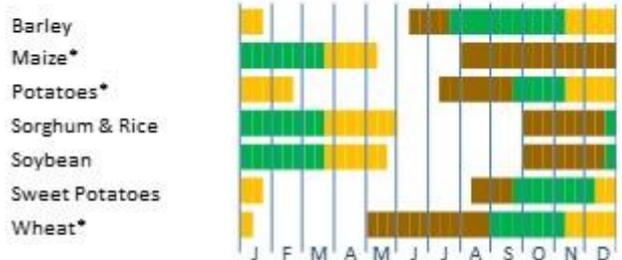
Planting of 2021 paddy crop ongoing under dry weather conditions

Planting operations of the 2021 paddy crop are ongoing. The planted area of paddy crop is anticipated to continue to decline and set a new record low level as the decreasing trend observed during the last ten years is likely to be exacerbated by the low availability of irrigation water. Weather forecasts indicate high probabilities of below-average precipitation in the last two months of 2020, which coincides with crop germination and early development stages, raising concerns on yield potential.

Uruguay

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Uruguay

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Rice (paddy)	1 314	1 200	1 209	0.8
Wheat	778	776	745	-4.0
Barley	533	607	670	10.4
Others	751	998	903	-9.5
Total	3 376	3 581	3 527	-1.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal exports in 2020/21 marketing year forecast at below-average levels

Total cereal exports in the 2020/21 marketing year (April/March) are forecast at a low level of 1.2 million tonnes. Exports of rice, the country's major exportable crop, are forecast to be below-average reflecting the low output harvested in 2020.

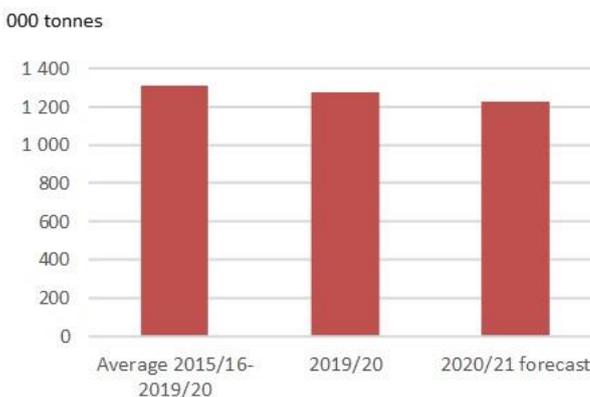
Cereal prices in September 2020 higher year on year

Prices of rice were stable in September for the second consecutive month and were more than 35 percent higher year on year due to the strong domestic and international demand amid the COVID-19 pandemic. Prices of maize have been steady or weakening since April, mainly reflecting the relative stability of the local currency in the past few months, following a steep increase in the first quarter of 2020. However, prices remained about 20 percent above their year-earlier values, mainly due to tight domestic supplies from lower imports and a yearly declined 2020 output. Similarly, prices of wheat grain were also up from a year earlier.

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Uruguay

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Uruguay

Reference Date: 19-May-2020

FOOD SECURITY SNAPSHOT

- While 2020 rice production followed declining trends, maize output estimated at above-average level
- Cereal exports in 2020/21 marketing year forecast at average levels
- Cereal prices in April 2020 higher year on year

While 2020 rice production followed declining trends, maize output estimated at above-average level

Harvesting of the 2020 summer crops, such as rice, maize and sorghum, finalized in mid-May. Following the trends in the decline in plantings, the 2020 paddy output is estimated at 1.2 million tonnes, about 10 percent below the previous five-year average level. Due to low financial returns to farmers, planted area has been gradually declining during the past ten years. Production of maize is estimated at an above-average level of 805 000 tonnes, as the near-record sowings more than offset the negative impact on yields by limited rainfall amounts in the first quarter of 2020. The high plantings mainly reflect the shift from soybean to maize production, particularly during the first season when soybean crop area shrunk for the fourth consecutive year. Plantings were also supported by the sustained increases in domestic prices of maize since April 2019.

Planting of the 2020 wheat crop started in mid-May and the area sown is officially forecast to be slightly below average. Weather forecasts for the June-August period point to a high likelihood of average rainfall across the main producing regions, raising yield prospects.

Cereal exports in 2020/21 marketing year forecast at average levels

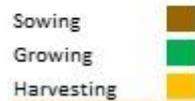
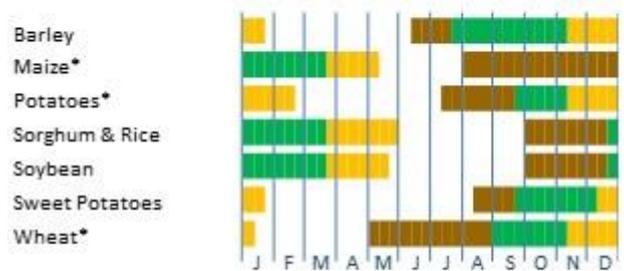
Total cereal exports in the 2020/21 marketing year (April/March) are anticipated at an average level of 1.26 million tonnes. Exports of rice, the country's major exportable crop, are expected at 820 000 tonnes, slightly lower than the previous five-year average, reflecting the below-average output in 2020.

Cereal prices in April 2020 higher year on year

Prices of cereals in April 2020 were higher than their year-earlier levels due to increased costs of mostly imported agricultural inputs, following the weakening of the local currency. As of

Uruguay

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Uruguay

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	1 306	1 180	1 165	-1.3
Wheat	778	776	770	-0.8
Barley	512	816	805	-1.3
Others	772	789	778	-1.4
Total	3 368	3 561	3 518	-1.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

April 2020, the local currency has lost one-fourth of its value over the past year. The sudden increase in domestic demand amid the COVID-19 breakout also put upward pressure on prices in March. However, prices of rice and maize stabilized in April due to improved market availabilities from the new harvests and the stable local currency that did not depreciate in April.

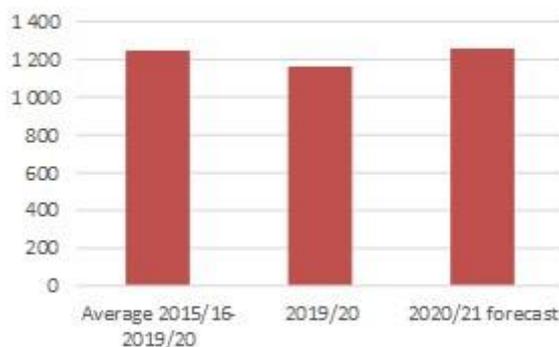
COVID-19 and measures adopted by the Government

The Government, retailers and producers agreed on a proposal [to not increase prices of basic food items](#) and hygiene products for a three-month period, starting from 11 May 2020. The Government [allocated an additional USD 22 million](#) to boost social services, including an increase in amounts of food vouchers. [Basic food baskets were distributed](#) in April and May to 118 000 vulnerable households.

Uruguay

Cereals Exports

000 tonnes



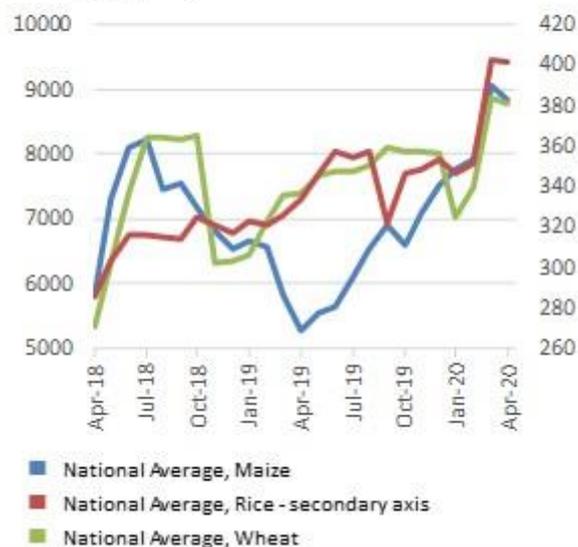
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals

Peso Uruguayo per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Uruguay

Reference Date: 28-January-2020

FOOD SECURITY SNAPSHOT

- While plantings of 2020 rice crop declined, area planted with maize expected at well above-average level
- Cereal production in 2019 estimated to be slightly above average
- Cereal exports in 2019/20 marketing year anticipated at below-average levels
- Cereal prices in December 2019 were above year-earlier levels

While plantings of 2020 rice crop declined, area planted with maize expected at well above-average level

The 2020 summer crops, such as rice, maize and sorghum, to be harvested from March, are currently in the vegetative stage. The planted area of the 2020 maize crop is officially estimated at 130 000 hectares, about 20 percent higher than the last five-year average. The high plantings mainly reflect the shift from soybean to maize, particularly during the first season soybean crop whose area shrunk for the fourth consecutive year. Despite the record maize production in 2019, domestic prices of maize have been increasing during the second half of 2019, due to strong demand by exporters as well as the domestic feed industry, triggering the increase in area sown in 2020. By contrast, according to official sources, the area sown of paddy is estimated at 135 000 hectares, about 15 percent below the average, reflecting low financial returns to farmers and their consequent shift to other remunerative crops such as soybeans or maize.

Cereal production in 2019 estimated to be slightly above average

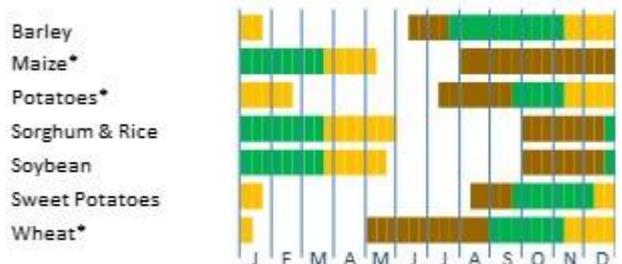
With the harvest of the 2019 wheat crop concluded in early January, the 2019 cereal cropping season was completed. Production is officially estimated at 3.51 million tonnes, slightly above average, mainly due to bumper outputs of maize and barley. The country's major cereals, rice and wheat, recorded below-average harvests due to the low level of plantings.

Cereal exports in 2019/20 marketing year anticipated at below-average levels

Total cereal exports in the 2019/20 marketing year (April/March) are anticipated at 1.27 million tonnes, slightly below the five-year average. Exports of rice, the country's major exportable crop, are

Uruguay

Crop Calendar (*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Uruguay

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Rice (paddy)	1 344	1 260	1 200	-4.8
Wheat	838	728	740	1.7
Maize	462	309	816	163.9
Others	727	770	757	-1.7
Total	3 372	3 067	3 512	14.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

expected at the below-average level of 790 000 tonnes, due to the estimated decline in 2019 rice production. However, they are expected to increase from the levels a year earlier, when the production was higher, year on year, reflecting a weaker local currency in 2019 that increased the competitiveness in the international markets.

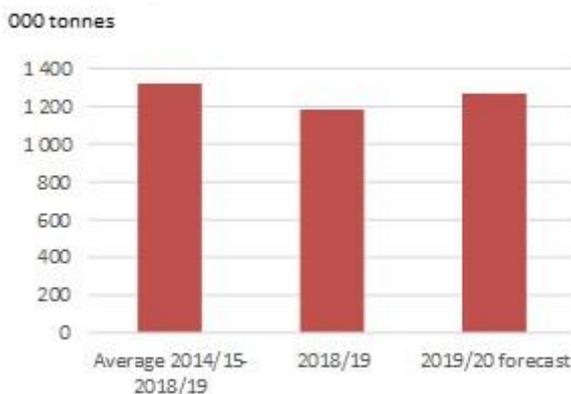
Cereal prices in December 2019 above their year-earlier levels

Prices of cereals in December 2019 were generally higher than their year-earlier levels due to increased production costs following the weakening of the local currency. Wholesale prices of rice increased seasonally from September to December 2019 and were more than 10 percent higher, year on year, mainly due to an expected contraction in plantings in the 2020 season. Prices of maize have been on the rise since April 2019 mainly due to the strong demand for domestic use and exports. Prices of wheat grain also showed a sustained increasing trend since early 2019, reflecting an increase in exports, sustained by the weaker currency.

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Uruguay

Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Uruguay

Reference Date: 17-May-2019

FOOD SECURITY SNAPSHOT

- Rice production in 2019 estimated to decline, while maize production expected well above-average
- Cereal exports in 2019/20 expected below average on account of decreased rice output
- Prices of rice and wheat grain higher than year-earlier levels

Rice production in 2019 estimated to decline, while maize production expected at well above-average

Cereal production in 2019 is forecast to rebound to slightly above-average levels of 3.5 million tonnes, mainly reflecting an increase in maize production.

Harvesting of the 2019 rice and maize crop has recently completed. Production of rice (paddy) is estimated at 1.2 million tonnes, 12 percent lower than the previous five-year average. The decline in production is mainly due to lower planting areas, as farmers shifted to plant more lucrative crops, on account of high production costs of rice. By contrast, production of maize is estimated at a near record level of 700 000 tonnes, mainly reflecting larger plantings as farmers opted to plant maize over soybean due to excessive rainfalls during the planting period of soybean. Production prospects were also boosted by excellent yields due to favourable weather conditions.

The 2018/19 wheat season was completed in January 2019, with record high yields. However, production was estimated at a below-average level of 728 000 tonnes as a result of the significant contraction in plantings. Planting of the 2019/20 crop will start in mid-May and the area planted is expected to rebound, instigated by the high level of prices.

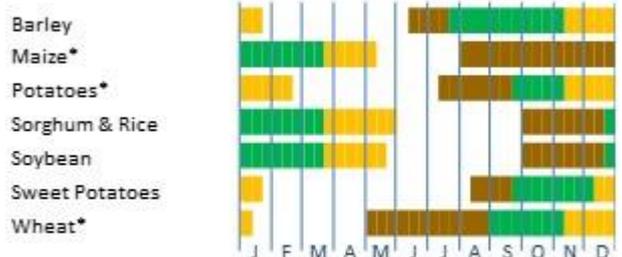
Cereal exports in 2019/20 expected below average due to decreased 2019 rice output

Total cereal exports in the 2019/20 marketing year (April/March) are forecast at 1.2 million tonnes, 7 percent lower than average, on account of the estimated decline in 2019 rice production. Rice exports account for about 70 percent of the total cereal exports. Due to the bumper 2019 maize output, maize exports are anticipated to resume after five years.

Uruguay

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Uruguay

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Rice (paddy)	1 340	1 242	1 180	-5.0
Wheat	838	728	740	1.7
Maize	462	309	700	126.5
Others	727	770	893	16.0
Total	3 368	3 048	3 513	15.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

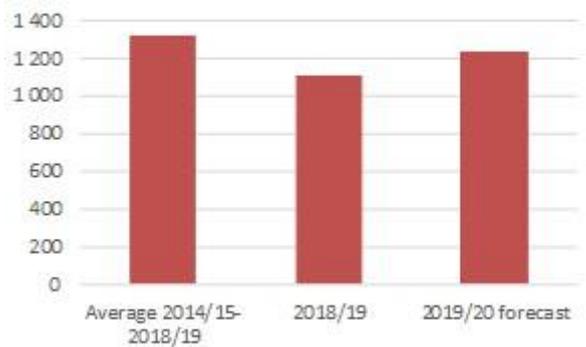
Prices of rice and wheat grain higher than year-earlier levels

In April, wholesale prices of rice increased despite the commercialization of recently harvested crops and were 17 percent above their year-earlier levels, mainly reflecting lower production. By contrast, prices of maize decreased significantly and were below their levels a year earlier, as the bumper output improved local supplies. Prices of wheat grain were 40 percent higher year on year mainly due to large exports in the first quarter of 2019, sustained by the significant depreciation of the country's currency.

Uruguay

Cereals Exports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale prices of cereals

Peso Uruguayo per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Uruguay

Reference Date: 28-August-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 forecast at lowest level in more than a decade due to drought
- Cereal exports in 2018/19 expected below average because of reduced domestic availability
- Wheat flour and rice prices higher than year-earlier levels

Cereal production in 2018 forecast at lowest level in more than a decade due to drought

Cereal production in 2018 is forecast at 2.8 million tonnes, 21 percent below the average of the past five years and the lowest level since 2007. The decline mainly reflects the impact of drought on the summer season. Harvesting of the 2018 summer season crops was completed in May and output was reported to be reduced due to the drought between December 2017 and March 2018. Furthermore, excessive rainfall in May delayed harvesting operations and reduced crop quality. Official estimates put outputs of maize and sorghum at 309 000 tonnes and 76 000 tonnes, 43 and 71 percent lower than their averages of the last five years, respectively. In the case of maize, despite an increase in area sown, the yield was adversely affected by the drought. By contrast, rice output was not affected by the drought as severely as other summer season crops, as it is grown under irrigated conditions. Output of rice in 2018 is forecast at 1.3 million tonnes, 6 percent down from the average of the past five years on account of the reduced area sown and the delayed planting of the second season paddy due to low temperatures in February.

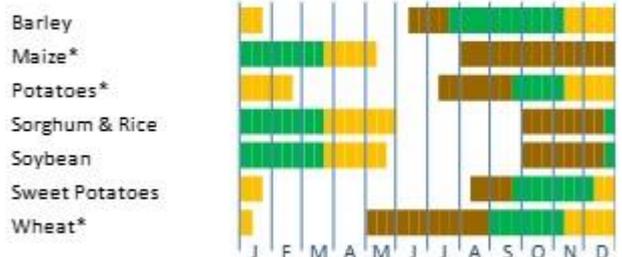
The 2018 winter season crops such as wheat, barley and oats are currently in the development stages. The 2018 wheat production is forecast at 520 000 tonnes, 48 percent down from the average of the past five years, although 18 percent higher than last year's output due to the increased area sown. Planting operations were moderately delayed due to wet conditions, however, the weather has been generally favourable during the growing season so far.

Cereal exports in 2018/19 expected below average because of reduced domestic availability

Total cereal exports in the 2018 marketing year (April/March) are forecast at a below-average level of 1.1 million tonnes on account of the expected drought-reduced production in 2018. By contrast

Uruguay

Crop Calendar (*major foodcrop)



Sowing: Brown square
Growing: Green square
Harvesting: Yellow square

Uruguay

Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	1 364	1 410	1 280	-9.2
Wheat	999	440	520	18.2
Maize	539	471	309	-34.4
Others	660	634	722	13.9
Total	3 562	2 955	2 831	-4.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheets

and for the same reason, cereal imports, in particular those of maize, are expected to increase to meet the sustained demand for feed use.

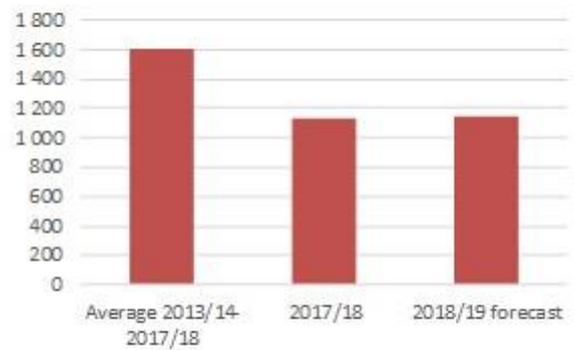
Wheat flour and rice prices higher than their year-earlier levels

Domestic prices of wheat flour have been increasing in recent months on account of the increased oil prices and tighter domestic supplies and, in early August, were higher than their year-earlier levels. Prices of rice have been stable since the beginning of 2018 but were 20 percent higher in July year-on-year.

Uruguay

Cereals exports

000 tonnes



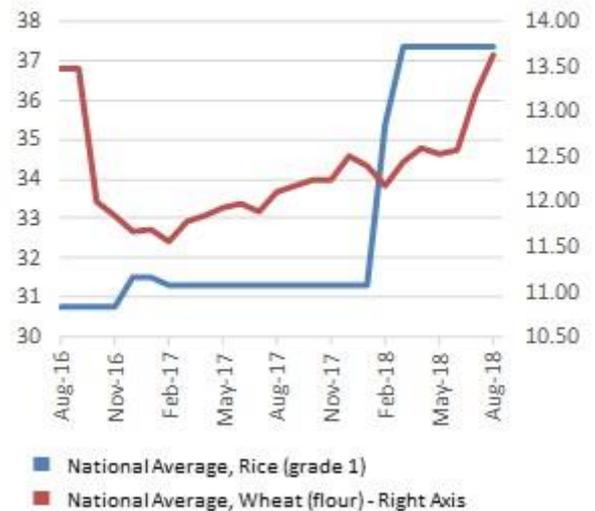
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Uruguay

Wholesale wheat flour and rice prices

Peso Uruguayo per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Uruguay

Reference Date: 27-April-2017

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 forecast to decline to nine-year low
- Cereal exports for 2017 marketing year forecast slightly above last year's level
- Wheat flour and rice prices relatively unchanged in March

Cereal production in 2017 forecast to decline to nine-year low

Cereal production in 2017 is forecast to decline some 4 percent and reach less than 3 million tonnes, its lowest level since 2007. The decline in cereal output mainly reflects lower plantings for maize and sorghum, which declined some 17 percent on average. This is mainly the result of higher input costs and lower producer prices due to the appreciation of the local currency, which has reduced the price competitiveness of Uruguayan crops, and ample availabilities from bumper 2016 crops in South America.

Planting of the 2017 wheat crop will start from May and sowings are anticipated to remain at last year's low level reflecting the prevailing low prices due to ample availabilities both at the national and regional levels. By contrast, the 2017 rice crop, whose harvest is well advanced, is anticipated to increase some 5 percent, mostly as a result of better yields as crop conditions have been favourable during the season.

Cereal exports for 2017 marketing year forecast slightly above last year's level

Total cereal exports in the 2017 marketing year (April/March) are preliminarily forecast at 1.7 million tonnes, with a marginal increase from its' previous year's level, but still below the last five-year average. The increase in exports mainly reflects the anticipated higher rice sales during the marketing year. By contrast, wheat and maize exports are anticipated to decline or remain unchanged as a result of ample availabilities of better-priced products in sub-regional markets.

Wheat flour and rice prices relatively unchanged in March

Domestic prices of wheat flour were unchanged in March as



Uruguay
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	1 366	1 304	1 365	5
Wheat	1 096	700	700	0
Maize	551	487	350	-28
Others	566	561	507	-10
Total	3 579	3 052	2 922	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

ample availabilities from the 2016 crop have kept prices some 10 percent below their year-earlier levels. Rice prices in March were also unchanged from their levels a month and a year earlier in anticipation of the entry into the market of the 2107 crop.



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GIEWS Country Brief Uruguay

Reference Date: 14-December-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 estimated to decline from last year's level
- Cereal exports forecast to increase in 2017 marketing year
- Wheat flour prices declined in November, rice prices increased seasonally

Cereal production in 2016 estimated to decline from last year's level

Cereal production in 2016 is estimated at about 3.3 million tonnes, sharply below last year's level and, for a second consecutive year, below the five-year average. The below-average harvests mainly reflect reduced maize and wheat plantings in the past two years as a result of low market prices and high carryover stocks. Rice production in 2016 is estimated at 1.3 million tonnes (paddy), 7 percent down from last year. The decline mainly reflects excessive rainfall at the beginning of the season, which adversely impacted the crop. Maize production in 2016 has been preliminarily estimated at 487 000 tonnes, virtually unchanged from last year's level but below the five-year average. The harvest of the 2016 wheat crop is well advanced and the production forecast has been revised downward as plantings were lower than originally anticipated. Preliminary estimates point to a decline in output of 25 percent to 890 000 tonnes reflecting a contraction of 30 percent in sowings due to the prevailing low market prices and high stock levels.

Planting of the 2017 summer maize crop is well advanced. Official data on sowing levels are not yet available. However, it is anticipated that plantings will decline reflecting the prevailing low market prices and ample carryovers from the 2016 crop.

Cereal exports forecast to increase in 2017 marketing year

Total cereal exports in the 2017 marketing year (January/December) are preliminarily forecast at 1.7 million tonnes, a sharp increase from last year's low level, but still below the five-year average. The increase in exports mainly reflects the anticipated higher rice sales during the marketing year. By contrast, wheat and maize exports are anticipated to decline reflecting this year's reduced outputs and low prices.



Uruguay
Cereal production

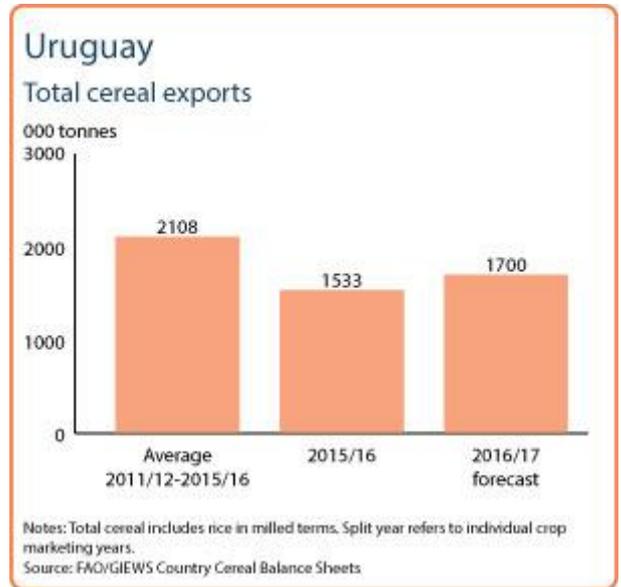
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Rice (paddy)	1 434	1 396	1 304	-7
Wheat	1 360	1 191	890	-25
Maize	510	480	487	1
Others	548	600	580	-3
Total	3 853	3 667	3 261	-11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Wheat flour prices declined in November, rice prices increased seasonally

Domestic prices of wheat flour declined in November as new product from the recent harvest and ample availabilities from last year have kept prices well below their year-earlier levels.

Rice prices in November increased moderately and were above last year's level as high export demand and the tight supply situation pressured prices.





GIEWS Country Brief Uruguay

Reference Date: 25-October-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 forecast close to last year's level
- Cereal exports forecast to increase in 2016/17 marketing year
- Prices of wheat flour declined in September, rice prices unchanged from their high level

Cereal production in 2016 forecast close to last year's level

Cereal production in 2016 is forecast at close to 3.4 million tonnes, moderately below last year's level and for a second consecutive year, below the five-year average. The below-average harvests mainly reflect reduced maize and wheat plantings in the past two years as a result of low market prices. Maize production in 2016 has been preliminarily estimated at 495 000 tonnes, 3 percent above last year's level but below the five-year average. Maize plantings in 2016 were estimated at 88 000 hectares, 6 percent up from 2015, but well below the average of about 120 000 hectares in recent years as a result of low market prices and high domestic availabilities. Rice production in 2016 is estimated at 1.3 million tonnes (paddy), 7 percent down from last year. The decline mainly reflects excessive rainfall at the beginning of the season, which adversely impacted the crop. The harvest of the 2016 wheat crop has begun. Wheat production for 2016 is forecast to increase moderately by 4 percent as plantings are estimated to have remained close to last year's level.

Cereal exports forecast to increase in 2017 marketing year

Total cereal exports in the 2017 marketing year (January/December) are preliminarily forecast at almost 1.8 million tonnes, a sharp increase from last year's low level, but still below the five-year average. The increase in exports mainly reflects anticipated higher rice and wheat sales during the marketing year.

Wheat flour prices declined in September, rice prices unchanged from their high level

Domestic prices of wheat flour declined in September with the beginning of the harvest and were well below their year earlier levels, reflecting the favourable prospects of the 2016 harvest.

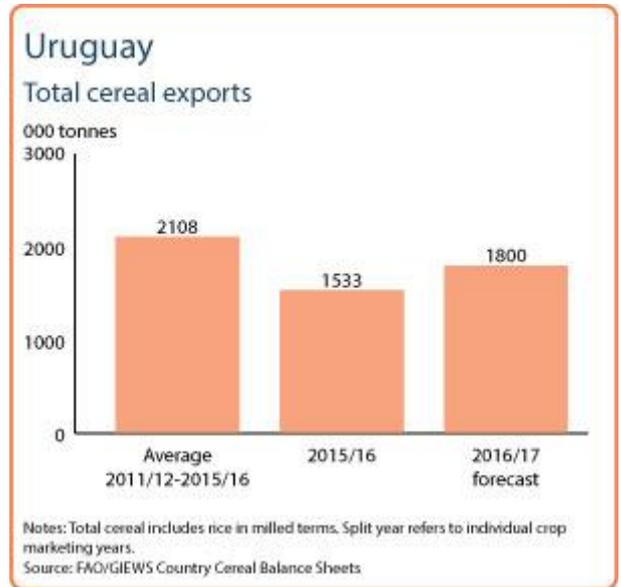


Uruguay
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	1 434	1 396	1 304	-7
Wheat	1 311	950	990	4
Maize	510	480	495	3
Others	548	600	580	-3
Total	3 804	3 426	3 369	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice prices in September were unchanged from the high level of the previous month and from a year earlier. Prices are being supported by this year's reduced output and high export demand.





GIEWS Country Brief Uruguay

Reference Date: 23-August-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 forecast close to last year's level
- Cereal exports forecast to increase in 2016/17 marketing year
- Wheat flour and rice prices stable in July, rice prices higher than a year earlier

Cereal production in 2016 forecast close to last year's level

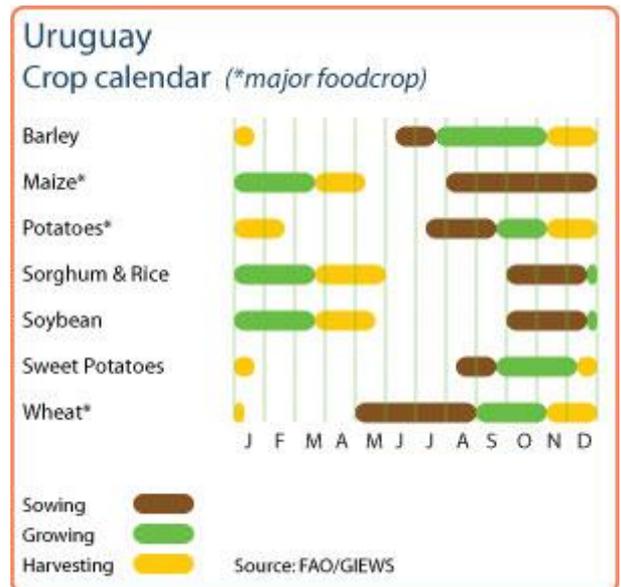
Cereal production in 2016 is forecast at close to 3.4 million tonnes, moderately below last year's level and for a second consecutive year below the five-year average. The below-average harvests mainly reflect reduced maize and wheat plantings in the past two years as a result of low market prices. Maize production in 2016 has been preliminarily estimated at 495 000 tonnes, 3 percent above last year's level but below the five-year average. Maize plantings in 2016 were estimated at 88 000 hectares, 6 percent up from 2015, but well below the average of about 120 000 hectares in recent years as a result of low market prices and high domestic availabilities. Rice production in 2016 is estimated at 1.3 million tonnes (paddy), 7 percent down from last year. The decline mainly reflects excessive rainfall at the beginning of the season, which adversely impacted the crop. Planting of the 2016 wheat crop is virtually concluded. Wheat production for 2016 is forecast to increase moderately by 4 percent, as plantings are estimated to have remained close to last year's level.

Cereal exports forecast to increase in 2016/17 marketing year

Total cereal exports in the 2016/17 marketing year (January/December) are preliminarily forecast at almost 1.8 million tonnes, a sharp increase from last year's low level, but still below the five-year average. The increase in exports mainly reflects anticipated higher rice and wheat sales during the marketing year.

Wheat flour and rice prices stable in July, rice prices higher than a year earlier

Domestic prices of wheat flour remained unchanged in July and from the same month last year, reflecting ample carryover stocks from the 2015 crop.

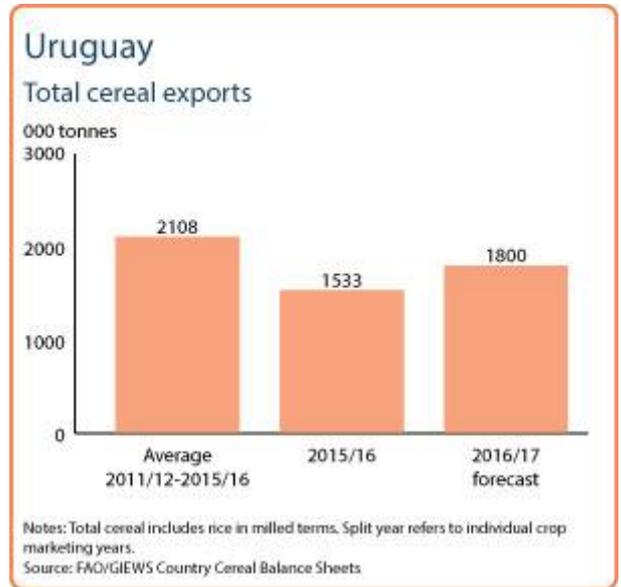


Uruguay
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	1,434	1,396	1,304	-7
Wheat	1,311	950	990	4
Maize	510	480	495	3
Others	548	600	580	-3
Total	3,804	3,426	3,369	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice prices in July were unchanged, but were 20 percent above their level from a year earlier. Prices are being supported by this year's reduced output and high export demand.



Reference Date: 24-November-2015

FOOD SECURITY SNAPSHOT

- Cereal production of 2015 anticipated to decline for a second year
- Cereal exports forecast to decline to an almost seven-year low for 2015/16 marketing year
- Wheat flour and rice prices stable in November

Cereal production of 2015 anticipated to decline for a second year

Cereal production has been preliminarily estimated at 3.3 million tonnes (paddy equivalent) for 2015. At this level, cereal output is some 6 percent below last year and 12 percent below the country's five-year average. The decline in production reflects the sharp drop in wheat output as sowings have been declining for two consecutive years driven by low regional and international prices and a slowdown in export demand. Preliminary forecasts put the 2015 wheat harvest at 950 000 tonnes, almost 14 percent less than last year. However, at this level, wheat output is more than sufficient to meet domestic utilization and allow for the excess to be exported. Maize output for 2015 has been preliminarily estimated to decline by 10 percent from last year and reach 509 000 tonnes, just 2 percent below the country's five-year average. The drop in maize output is also a reflection of a reduction in sowings due to low regional and international prices.

Sowing of the 2016 maize crop is almost concluded. While no official data exists with respect to area sown, expectations are that the area planted will continue to decline reflecting the prevailing low prices and ample stocks, both domestically and in major regional exporters, such as Brazil and Argentina. The sowing period has been undergoing under unusually dry conditions, particularly in the southeast of the country. However, precipitations have been close to average in most of the country.

Cereal exports forecast to decline to an almost seven-year low for 2015/16 marketing year

Total cereal exports in the 2015/16 marketing year (January/December) are preliminarily forecast at almost 1.6 million tonnes, their lowest level in almost seven years. The decline in exports mainly reflects lower wheat exports which are forecast at sharply reduced levels. However, maize exports are also expected to strongly decline due to strong regional competition.

Wheat flour and rice prices stable in November

Domestic prices of wheat flour remained unchanged in November, but remained above last year's level reflecting the anticipated drop in this year's output and the depreciating currency.

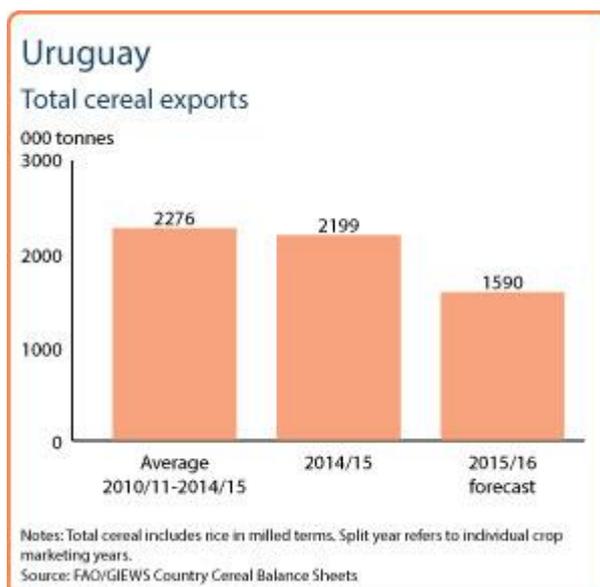
Rice prices were also unchanged in November, but were below last year's level reflecting the recovery of this year's production from last year's lower level.



Uruguay Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	1,386	1,100	950	-14
Rice (paddy)	1,385	1,348	1,360	1
Maize	520	564	509	-10
Others	500	538	551	2
Total	3,791	3,550	3,370	-5

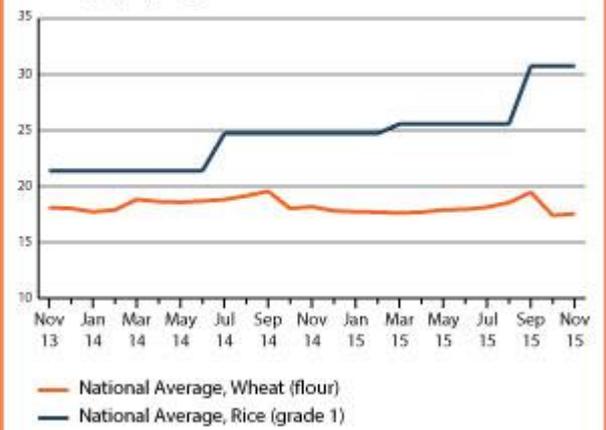
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Uruguay

Wholesale wheat flour and rice prices

Peso Uruguayo per Kg



Source: Unidad Centralizada de Adquisiciones - Ministerio de Economía y finanzas

Reference Date: 12-March-2014

FOOD SECURITY SNAPSHOT

- Early prospects for the 2014 maize production are favourable
- Cereal exports to decline in 2013/14 marketing year
- Wheat flour prices stable in February but at high levels

Early prospects for the 2014 maize production are favourable

Harvesting of the 2014 maize crop has just begun. Production prospects are generally favourable as crops benefitted from good weather conditions during the growing season, with yields close to last year's good levels.

Cereal production in 2013 is estimated at a record level of almost 4.1 million tonnes, 13 percent higher than in 2012, as a result of a strong increase in maize and wheat outputs. Official estimates of the 2013 wheat production point to a production of 1.5 million tonnes or 56 percent higher than the reduced 2012 level, while maize output reached almost 700 000 tonnes or 16 percent higher than in 2012. The increases reflect high plantings, due to sustained demand, and improved yields, following the use of higher yielding seed varieties and favourable weather conditions during the season.

Cereal exports to decline in 2013/14 marketing year

Total cereal exports in 2013/14 marketing year are anticipated to decline, mainly on account of a decline in rice exports in 2013 from the high levels of the previous year. Wheat exports are expected to remain unchanged.

Wheat flour prices stable in February but at high levels

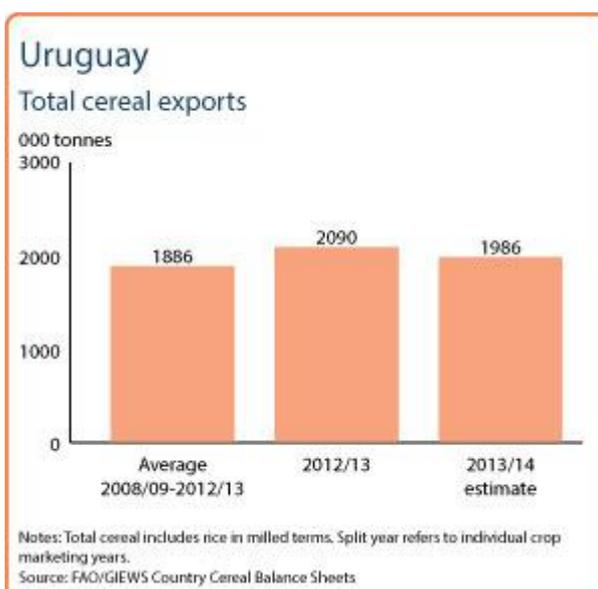
Prices of wheat flour remained unchanged in February and one-third above their year-earlier levels despite ample supplies from last years' harvest. Prices were mainly supported by high regional export demand.



Uruguay Cereal production

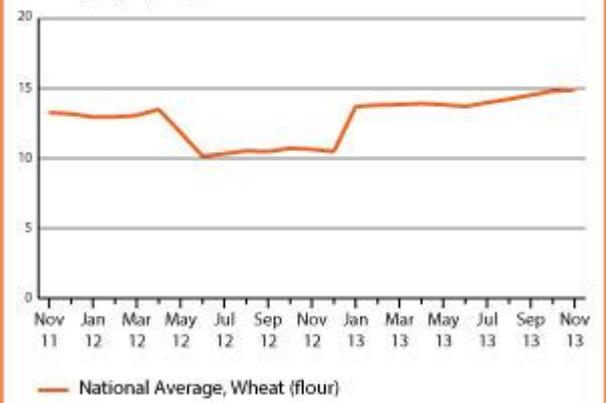
	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	1,500	982	1,533	56
Rice (paddy)	1,367	1,424	1,359	-5
Maize	390	529	693	31
Others	573	648	493	-24
Total	3,829	3,583	4,078	14

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Uruguay Wholesale wheat flour prices

Peso Uruguayo per Kg



Source: Unidad Centralizada de Adquisiciones - Ministerio de Economía y Finanzas

Reference Date: 29-November-2013

FOOD SECURITY SNAPSHOT

- The 2013 cereal production forecast at above average levels
- Lower rice exports in 2013
- Wheat flour prices stable in November but high

The 2013 cereal production forecast at above average levels

Harvesting of the 2013 winter wheat and barley crops is about to begin. New official estimates for the total area planted to the 2013 wheat crop were revised upward to 472 000 hectares, about 4 percent above last year's reduced plantings. As a result of adequate rains and temperatures during the cropping season, particularly in the main producing areas of Colonia, Soriano and Río Negro, normal yields are expected. The wheat output is forecast at 1.56 million tonnes, a 15 percent recovery from the 2012 low level.

Harvesting of the 2013 summer maize crop was completed in May and production was officially estimated at a new record level of 693 000 tonnes, some 26 percent up from last year's bumper crop. The increase in production reflects high plantings as a result of the sustained demand from the feed industry and improved yields due to the use of higher yielding seed varieties and favourable weather conditions during the season. Production of rice crop, harvested also earlier in the year, was estimated at 1.42 million tonnes (in paddy terms), relatively unchanged from last year's level.

In aggregate, the 2013 cereal production (summer and winter crop seasons) is expected to reach 4.1 million tonnes, about 5 percent higher than in 2012.

Rice exports estimated to decline in 2013 marketing year (January/December)

Rice exports, accounting for about half of the total exports, are forecast lower than the record level of the previous marketing year, which reflected ample carryover stocks from the 2011 bumper crop. Wheat exports are expected to remain unchanged.

Wheat flour prices stable in November but at high levels

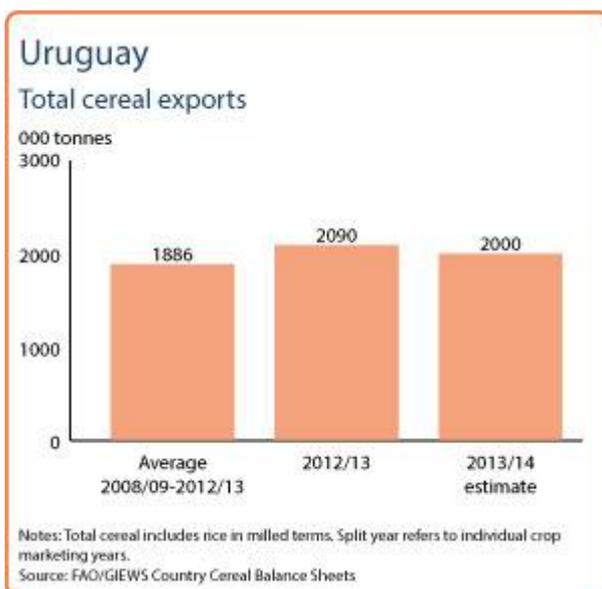
Average wholesale prices of wheat flour remained firm in November. However, at about UYU 15 per kg, wheat flour prices were almost 40 percent higher than in November 2012 due to lower market availabilities following last year's reduced production.



Uruguay Cereal production

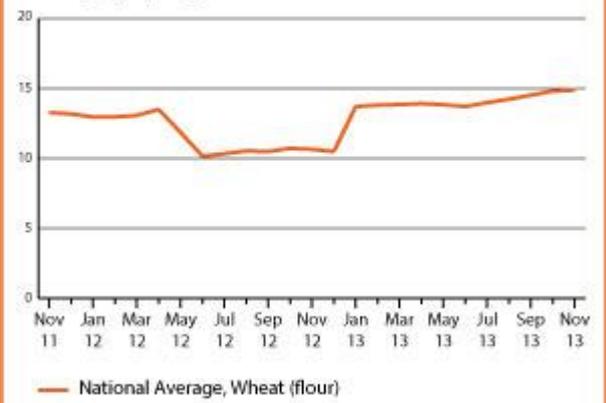
	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes			percent
Wheat	1 574	1 350	1 560	16
Rice (paddy)	1 367	1 424	1 420	0
Maize	390	529	693	31
Others	573	648	493	-24
Total	3 903	3 951	4 166	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Uruguay Wholesale wheat flour prices

Peso Uruguayo per Kg



Source: Unidad Centralizada de Adquisiciones - Ministerio de Economía y Finanzas

Reference Date: 02-July-2013

FOOD SECURITY SNAPSHOT

- Record 2013 maize production
- Lower rice exports in 2013
- Wheat flour prices stable

Record 2013 maize production

Harvesting of the 2013 summer season rice, maize and sorghum crops was completed in May. The maize output was estimated at a record level of 750 000 tonnes, some 36 percent up from last year's bumper crop, reflecting an increase in the area planted in response to sustained demand from the feed industry, and improved yields due to the use of higher yielding seed varieties and favourable weather during the season. Production of rice was estimated at 1.38 million tonnes (in paddy terms), some 3 percent down from last year's level, but still average. A reduction in the area planted, due to a diversion of land to more profitable crops, was only partially offset by higher yields following generally favourable weather conditions.

Planting of the 2013 winter wheat and barley crops, to be harvested towards the end of the year, began with some initial setbacks in May due to heavy rains during most of the month, but picked up significantly in June. The area planted to wheat is expected to increase by about 4 percent and assuming normal growing conditions in the coming months, the output is forecast to recover from last year's reduced level.

In aggregate, the 2013 cereal production (summer and winter crop seasons) is expected to reach 4.1 million tonnes, about 4 percent higher than in 2012.

Cereal exports forecast to decline in marketing year 2013 (January/December)

Cereal exports, mainly wheat and rice, in marketing year 2013 (January/December) are expected to decrease for the second consecutive year. The decline mainly reflects reduced exports of rice in response to the contraction in the 2013 output. By contrast, maize exports are anticipated to soar following this year's record outcome.

Wheat flour prices stable in recent months

The average wholesale price of wheat flour has remained relatively unchanged since the beginning of the year. However, the food price index in April was 10.7 percent up from levels a year earlier and slightly above the general price inflation.



Uruguay
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Wheat	1,566	1,311	1,485	13
Rice (paddy)	1,367	1,424	1,380	-3
Maize	394	550	750	36
Others	573	648	493	-24
Total	3,899	3,933	4,108	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 06-August-2012

FOOD SECURITY SNAPSHOT

- Unfavourable prospects for the 2012 wheat crop
- Bumper coarse grains harvest expected
- The 2012 rice production estimated below last year's record level

Unfavourable prospects for the 2012 wheat crop

Planting of the 2012 winter wheat and barley crops is well advanced under favourable weather conditions so far. However, the area planted to wheat is officially forecast to decline by some 30 percent compared to the high level of 2011, mainly in response to increasing costs of production. Conversely, plantings of barley are expected to increase. Assuming normal growing conditions in the coming months, the 2012 wheat output is forecast at about 1.3 million tonnes or 34 percent below the record level of 2011, while barley production is expected at around 375 000 tonnes or 15 percent higher than in the past year.

Harvesting of the 2012 summer rice, maize and sorghum crops was completed in May. The rice output is estimated at 1.4 million tonnes or 13 percent below last year's level, although still the second largest harvest on record. The year-on-year reduction reflects a 7 percent decline in the area planted and a return to normal yields from last year's exceptional levels. By contrast, the 2012 maize and sorghum outputs are estimated well above the reduced crops of 2011, with maize production at record highs. The sharp increase mainly reflects an increase in both the area planted and yields.

The 2012 soya-beans crop production –a key source of the country's foreign exchange- is estimated at a record level of about 2 million tonnes, mainly as a result of higher yields following beneficial rains during the growing period.

Cereal exports expected to decline in marketing year 2013 (January/December)

Cereal exports, mainly wheat and rice, in marketing year 2013 (January/December) are forecast at about 2.1 million tonnes, 17 percent lower than in the previous year but still well above average. Despite the reduced 2012 wheat output, cereal exports are forecast to remain at relatively high levels due to carry-over stocks from last year's bumper crops.

Prices of bread higher than a year earlier

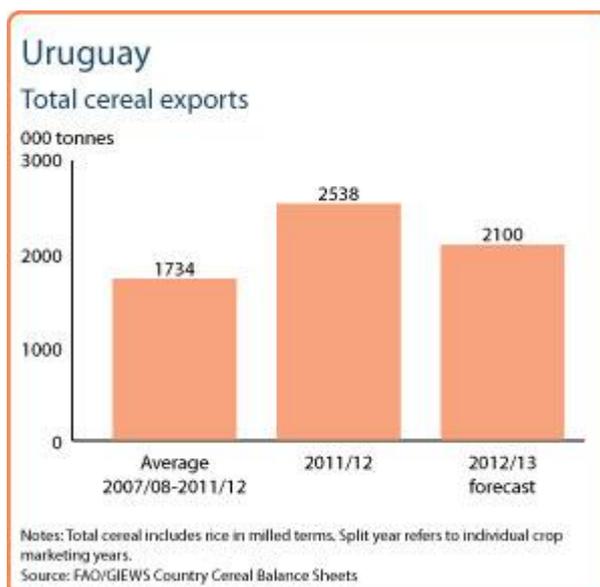
Prices of bread in June were 10 percent higher than in June 2011, mainly reflecting inflationary pressures. However, prices of wheat flour remained relatively unvaried in May and June, after a moderate increase in April. Rice prices have risen moderately in May and June, and were at the same level of June 2011.



Uruguay
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	1 440	2 000	1 320	-34
Rice (paddy)	1 311	1 643	1 424	-13
Maize	352	290	420	45
Others	542	474	648	37
Total	3 646	4 407	3 812	-14

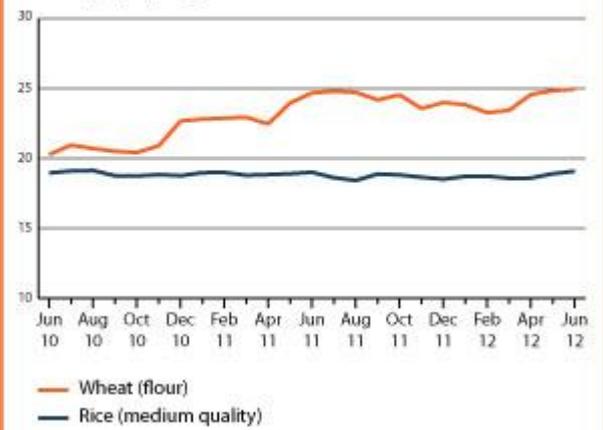
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Uruguay

Selected retail cereal prices in Montevideo

Peso Uruguayo per Kg



Source: Dirección General de Comercio - Ministerio de Economía y Finanzas

Reference Date: 29-February-2012

FOOD SECURITY SNAPSHOT

- Recent rains bring relief to 2012 summer crops
- 2011 wheat production at record levels
- High inflation in 2011

Recent rains bring relief to 2012 summer crops

Harvesting of the 2012 summer rice, maize, sorghum and soya beans crops will begin in mid-March. Below normal rainfall during planting activities, particularly in the northern zone of the country, caused partial losses of sown areas, and average yields are expected to be down. However, heavy rains in February helped to alleviate moisture deficits, preventing further deterioration of the crops. In the case of rice, an 8 percent reduction is estimated in the area planted, and production is expected to be below the high level recorded in 2011.

2011 wheat production at record levels

The 2011 wheat harvest, which was completed in January, is estimated at around 2 million tonnes, almost double the average of the previous five years. Official estimates show that the area sown increased to 593 000 hectares in response to high prices on the international market at the time of sowing in May 2011, with yields of 3.4 kg per hectare, the highest of the last 10 years.

Inflation in 2011 higher than last year

The consumer price index rose by 8.6 percent in relation to 2010 (6.93 percent), compared to the official target of 6 percent. The higher inflation rate in 2011 is mainly explained by higher food prices, wages, and housing costs — the same factors as in previous years.



Uruguay
Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Rice (paddy)	1 241	1 149	1 650	44
Wheat	1 162	1 301	2 000	54
Barley	360	186	335	80
Others	481	447	525	17
Total	3 245	3 083	4 510	46

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 13-June-2011

FOOD SECURITY SNAPSHOT

- 2011 rice crops expected to be at record levels
- Record area of wheat expected in 2011/12
- Wheat flour prices high

2011 rice crops expected at record levels

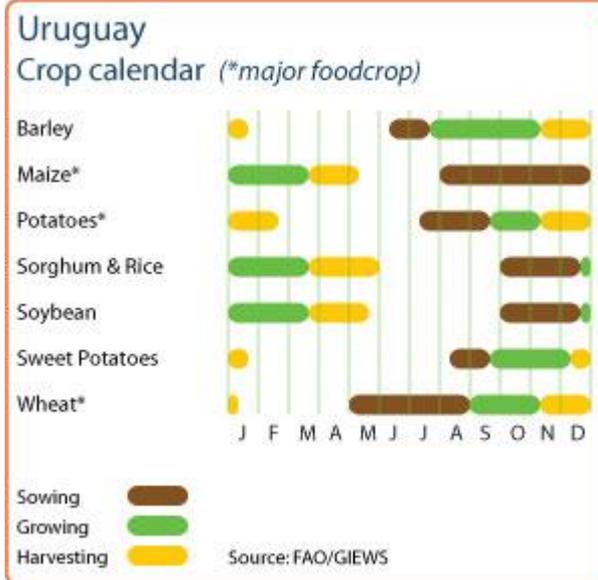
The harvest of the summer cereal crops, mainly rice, has just been completed. Early estimates indicate that rice (paddy) production will total 1.65 million tonnes, 44 percent more than in 2010 - an all time high level. Despite dry weather in the north of the country in December at the end of the sowing season which led to crop losses, subsequent favourable rainfall filled the irrigation basins. Particularly favourable weather conditions during the period of growth of the crops made it possible to gain an excellent yield of 8.4 tonnes per hectare, while the area sown increased by 18 percent to 195 000 hectares - the largest area recorded since 2000. Uruguay exports around three-quarters of the rice it produces and it is expected that levels exported will increase substantially in 2011.

Record area of wheat expected in 2011/12

The 2011/12 wheat crop is currently being sown. Early estimates indicate a 25 percent increase in the area sown compared to the 2010/11 season in response to high prices on the international market. Assuming normal yield and weather conditions, wheat production for the next season could reach 1.4 million tonnes - 11 percent more than the amount reached last year.

Wheat flour prices high

Prices of wheat flour have been increasing since mid-2010 due mainly to the reduced wheat production last year and the increase of prices in the international market. In April 2011, prices were 12 percent higher than they were at the same month last year. Prices of rice, on the other hand, remain stable. High prices of wheat flour and other foods are causing inflationary pressure on the economy. The government has postponed the increase in tariffs of basic services in order to contain inflation.



Uruguay Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	1 241	1 149	1 650	44
Wheat	1 162	1 301	1 447	11
Barley	360	186	335	80
Others	195	161	225	40
Total	3 293	3 326	3 957	19

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 10-February-2011

FOOD SECURITY SNAPSHOT

- Cereal output reduced in 2010 from the 2009 record
- Early outlook unfavourable for 2011 crops due to erratic and deficient rainfall
- Domestic cereals prices remain stable

Cereal output reduced in 2010 from previous year record

The 2010 winter cereals harvest, mainly wheat and barley, is almost complete. Early estimates point to reduction in output from the record 2009 levels as a result of a significant reduction in sown acreages and crop yields. The reduction in the acreage under wheat is put at 13 percent, or 70 000 hectares less than for the 2009 crop, down to 488 000 hectares. For barley, the reduction was more marked, reaching 50 percent, down to 73 500 hectares, the lowest in the past decade. The smaller area under cereal cover is due a combination of the wet weather at the time of sowing and to a shift in acreage towards the more profitable soybeans production.

The reduction in wheat yields reflects the water deficits that affected the main wheat producing departments of Soriano, Colonia, Rio Negro and Paysandú.

Provisional estimates put the total cereal crop in 2010 at about 3.5 million tonnes, 17 percent below the 2009 record, but still 13 percent above the average of the previous five years. The sharpest reduction from 2009 is for wheat (- 31 percent) while barley and paddy (harvested in early 2010) are estimated to be down by 11 percent. By contrast maize and sorghum output was 529.146 and 138.251 tonnes respectively. Maize production constitutes an historical record production.

Early outlook for 2011 maize and rice crops unfavourable

Planting and early development of summer crops of maize and rice crops for harvest from April have been affected by erratic weather this year. The area planted to both crops was reduced and low rainfall recorded during the last two months of 2010 and early January 2011 severely stressed crops. On 23 December 2010, the Government of Uruguay declared an "agriculture state of emergency". The declaration opens the way to grant small farmers government support.

Cereals exports lower in 2010/11 marketing year

Because of the lower production in 2010, cereal exports during the 2010/11 marketing year are forecast to fall by over 9 percent to some 1.7 million tonnes from the 2009/10 record level, but to remain well above the average of the previous five years.

Cereals prices remain relatively stable

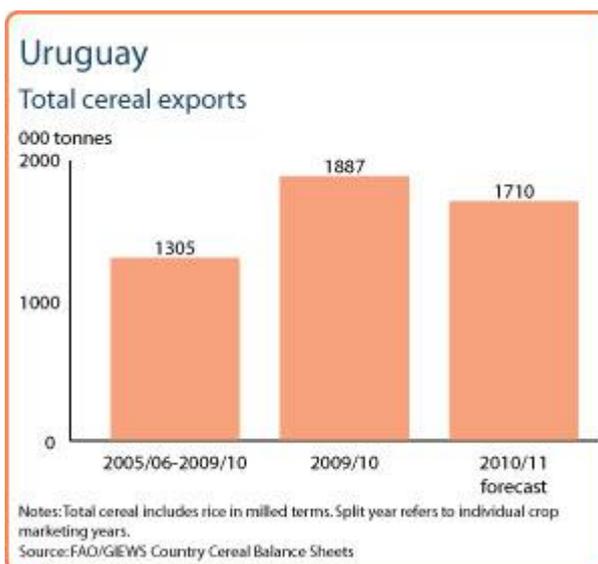
The reduction in 2010 cereal production had not yet affected domestic cereal prices as of November 2010, the latest date for which prices are



Uruguay Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	1254	1287	1150	-11
Wheat	988	1821	1250	-31
Barley	371	462	410	-11
Others	465	617	667	8
Total	3078	4187	3477	-17

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



available. This stability probably reflects the ample cereal supplies still available from the 2009 record harvest.



Reference Date: 10-November-2010

FOOD SECURITY SNAPSHOT

- 2010 wheat output is expected to be below the 2009 record levels and above average
- Lack of rainfall for the current sowing of summer cereals
- Cereals prices remain stable

2010 wheat production below the 2009 record levels but above average

The 2010 winter cereals harvest, mainly wheat and barley, is underway. There is expected to be a sharp decline in output from the record 2009 levels as a result of a significant reduction in sown acreages. The reduction in the acreages under wheat is put at 13 percent, or 70 000 hectares less than last year, down to 488 000 hectares. For barley, the reduction is more marked, reaching 50 percent, down to 28 000 hectares, the lowest in the past decade. The smaller area under cereal cover is due to the wet weather at the time of sowing and the fact that in the first season more soybean was sown, offering greater returns.

Provisional forecasts indicate a 31 percent decline in wheat production from the 2009 record harvest. Nevertheless, the predicted 1.25 million tonne harvest would still be far above the average level of the past five years.

Maize and rice sowing is underway

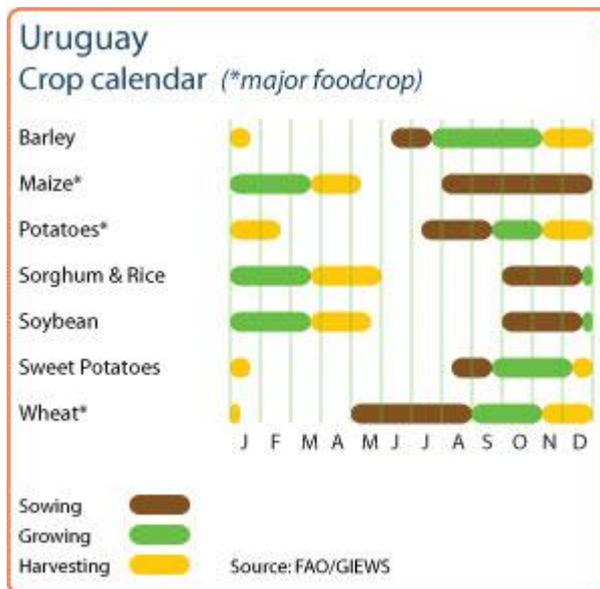
Good rainfall in the first decade of November improved the soil moisture content following the below-normal rainfall in October. It is expected that 99 000 ha will be sown with maize, slightly less than last year's high level which produced a record output. Less rice may be sown in this season because of the late rains.

2009/10 cereals exports at record levels

Cereals exports in the 2009/10 commercial season stood at about 1.9 million tonnes, some 43 percent above 2008/09 and up to 73 percent over the average of the past five years. The Government of Uruguay estimates that the economy will expand this year by 4 percent, driven, among other things, by increased cereals exports.

Cereals prices remain stable

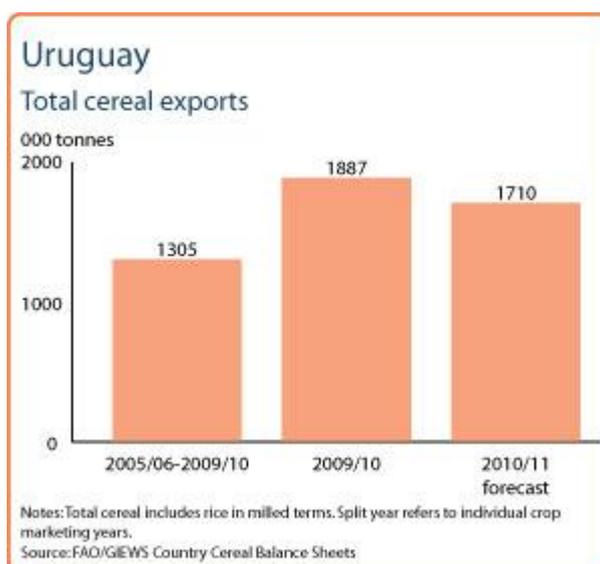
Wheat flour, bread and rice prices remain stable or are falling because of the unprecedented high wheat production in 2009 and the good 2010 rice harvest.



Uruguay Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	1254	1287	1100	-15
Wheat	988	1821	1250	-31
Barley	371	462	410	-11
Others	465	617	687	11
Total	3078	4187	3447	-18

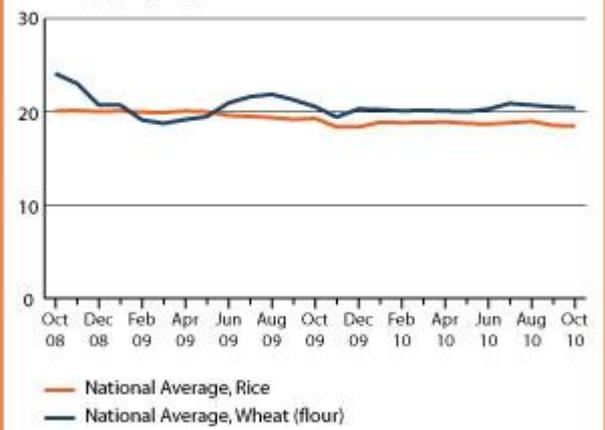
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Uruguay

Selected retail cereal prices

Peso Uruguayo per kg



Source: Instituto Nacional de Alimentacion, Uruguay

Reference Date: 11-June-2010

FOOD SECURITY SNAPSHOT

- Recent rainfall increased moisture levels and benefited planting of the winter wheat crop
- Maize production in 2010 recovered from last year's low output and is estimated at above average levels
- Prices of main staples have been generally stable since January 2010

Wet weather returned to Uruguay favouring planting of the winter wheat crop

Planting of the winter wheat has recently started in the departments of Colonia, Soriano, Río Negro and Paysandú. Although scattered and heavier over the central-south and northwest coastal departments, generally average rainfall levels in May benefited the planting of the crop. In April, drier weather conditions prevailed over most of the country, favouring harvesting of the coarse grains crops.

The 2010 maize harvest completed with good production estimates

Harvesting of 2010 coarse grains crops was completed in May and estimates point to a well above average output mainly due to a 20 percent increase in maize planted area and favourable weather conditions throughout the season.

On the other hand, harvesting of the 2010 rice crop is well advanced in the zona Norte Litoral-Oeste, zona Centro and Zona Este. According to the official survey conducted at the end of April, the total planted area (161 000 hectares) is similar to the previous year but slightly below average. This is mainly due to dry spells and erratic rains at the beginning of the 2009 winter season which discouraged farmers from planting.

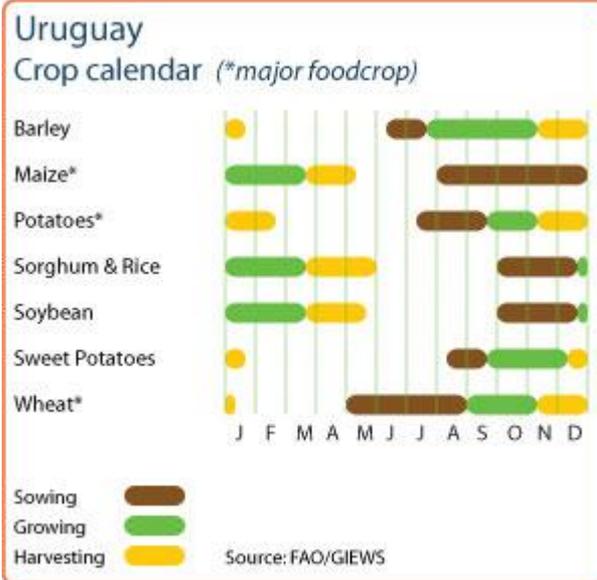
Cereal exports in 2009/10 put at record levels

Cereal exports in 2009/10 are estimated at about 1.9 million tonnes, 43 percent more than in 2008/09 and 73 percent up on the average of the previous five years. The Uruguayan government forecast that the economy will expand by 4 percent this year, partly driven up by the increasing wheat export volumes.

Prices of staples have been generally stable since the beginning of 2010

At national level, cereal prices remained generally stable for the last several months.

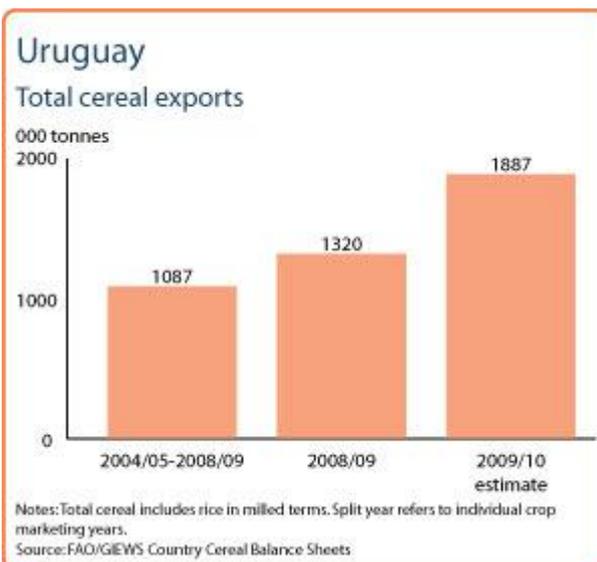
In April 2010, price quotations for wheat flour were 6 percent higher compared to previous year but almost 15 percent below the levels in 2008. Retail prices of rice maintained a generally declining trend since August 2008.



Uruguay Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	1254	1287	1150	-11
Wheat	988	1821	1250	-31
Barley	371	462	410	-11
Others	465	617	667	8
Total	3078	4187	3477	-17

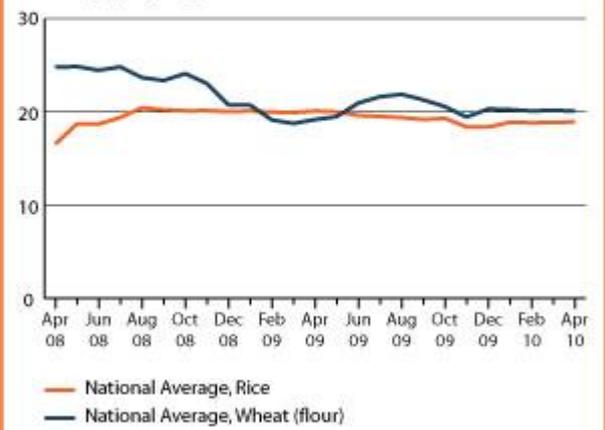
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Uruguay

Selected retail cereal prices

Peso Uruguayo per kg



Source: Instituto Nacional de Alimentacion, Uruguay

Reference Date: 06-April-2010

FOOD SECURITY SNAPSHOT

- Good rainfall levels recorded in major farming departments.
- 2009 wheat production estimated at record level.
- Cereal exports increased by 41 percent in MY 2009/10.

Generally good rainfall levels favoring increased water availability for agriculture and pasture

The major farming areas of the country, which had a dry 2009 winter cropping season, received relatively high rainfall amounts in the last four months so that the seasonal balance is now strongly positive.

2009 wheat production exceeded record estimates

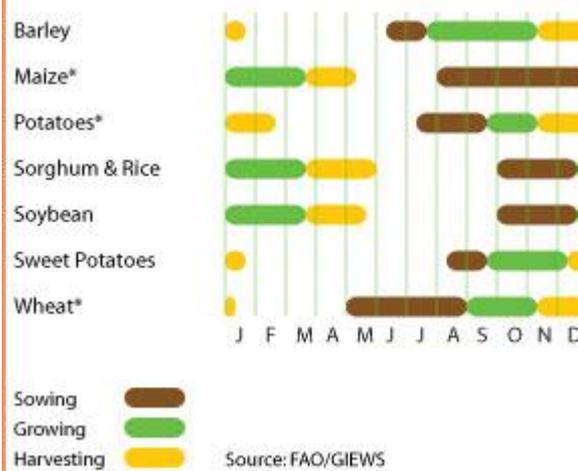
Wheat harvesting was completed in January and official figures for wheat production indicate the highest output ever of approximately 1.8 million tonnes, more than doubling the level of the previous campaign. Total harvested area was estimated at 549 thousand hectares, exceeding more than 80 thousand hectares the previous season's planting, and average yields marked a record of 3.3 kg per hectare. Pasture grassland associated with winter crops, after a sharp decline recorded during previous year, had a slight improvement in 2009, with positive effects on livestock sector.

Harvesting of 2010 coarse grains crops is currently underway and production outlook is good due to a 20 percent increase in maize planted and favourable weather conditions throughout the season.

2009/10 cereal exports at record level

Cereal exports in marketing year 2009/10 are estimated at about 1.7 million tonnes, 41 percent more than in 2008/09 and even 61 percent above the level reached in 2007/08. The Uruguayan government forecast that the economy will expand by 4 percent this year, also driven up by the increasing wheat export volumes.

Uruguay Crop calendar (*major foodcrop)

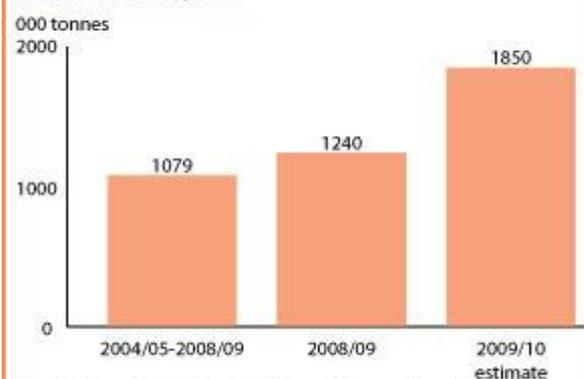


Uruguay Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	1249	1330	1287	-3
Wheat	609	750	1840	145
Barley	360	410	380	-7
Others	406	508	617	21
Total	2624	2998	4124	38

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Uruguay Total cereal exports



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

Reference Date: 19-January-2010

FOOD SECURITY SNAPSHOT

- Good rainfall levels to replenish water reservoirs
- Upwards sowing intentions for first and second maize cropping season
- A record winter wheat production is expected

Generally good rainfall levels favoring increased water availability for agriculture and pasture

In November high rainfall levels compared to seasonal average caused the flood of the Uruguay river, fluvial border between the country and Argentina affecting almost 6 thousand people.

In January localized floods occurred in the northwest areas of the country with minimum damages to people and infrastructure.

However, compared to January 2009 hit by a severe drought, the spread humidity favored abundant pasture which will benefit livestock production for the next season.

Maize sowing intentions going upwards

First season maize planting was completed in December. According to the field survey *Encuesta Agrícola "Primavera 2009"* conducted by the Ministry of Agriculture, 108 000 hectares are expected to be planted between the first and the second campaign.

Sowing intentions are approximately 15 percent higher compared to data collected with the previous survey (June 2009) and if realized, the total maize planted area will be 30 percent higher compared to previous campaign and approximately 90 percent compared the last five year's average.

Sowing of sorghum is completed. The initial planting projection at the beginning of the cropping season was not reflected by the actual planted area. Total planted hectares are expected to reach 60 thousand hectares while in 2009 the total planted area with sorghum was 89 thousand hectares.

Record winter wheat production expected

Wheat harvesting is underway in the major producing departments in the western areas of the country.

As of December 2009, when the official field survey was conducted, only 13 percent of the total planted areas had been harvested.

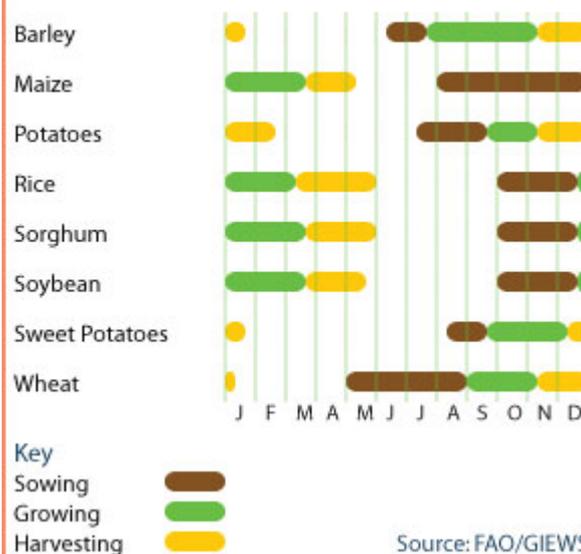
Preliminary estimate point at the highest output ever of 1.6 million tones, more than doubling the level of the previous campaign (750 thousand tons): This record acreage is due to the increased planted area (almost 80 mil hectares more compared to last campaign) and high yields (estimate din 3.0 kg/hectare, 20 percent above average) boosted by low input costs at the beginning of the planting season.

Wheat flour prices continue to fall

As of December 2009, domestic retail prices of wheat flour show a slight upward trend but still remaining below the level of two year ago as a result of the good forthcoming wheat production

Conversely, even though rice prices have fallen slightly in recent

Crop calendar Uruguay



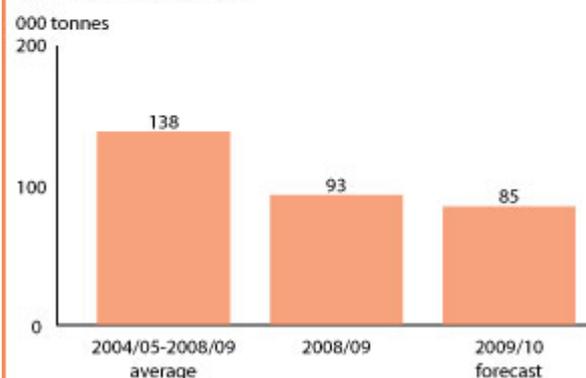
Uruguay

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Rice (in milled terms)	875	931	901	-3
Wheat	609	750	1620	116
Barley	360	410	380	-7
Others	406	508	617	21
Total	2250	2599	3518	35

Note: percentage change calculated from unrounded data.

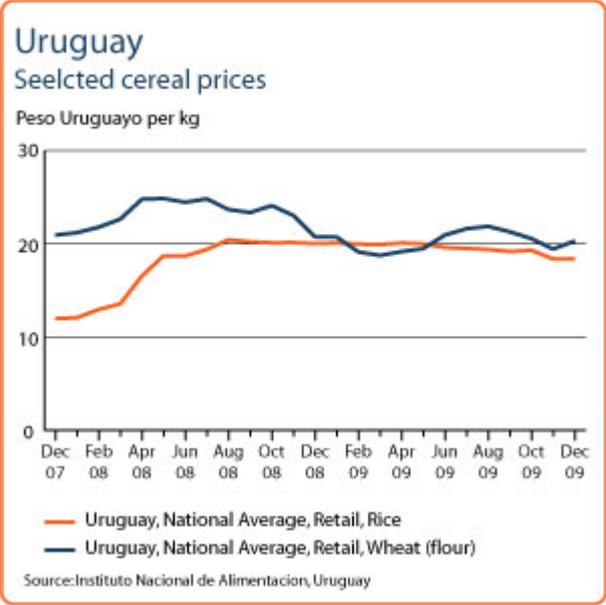
Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

months and continued to decrease in the last quarter, they still stand at approximately pesos18/kg close to the highest price recorded in the last two years (pesos 20.5/kg)



Reference Date: 30-September -2009

FOOD SECURITY SNAPSHOT

- In 2009, lower maize production compared to initial expectations
- Wheat output forecast to repeat record level of 2008
- Downward trend for domestic price of wheat flour while rice remain stable although more than double compared to the level of two years ago

Rainfall is not expected to fall below normal levels

In the three-month period June-August 2009 most of the country suffered from water shortages. The most serious shortages were in the north and north-east where rainfall, in some cases, was 60 percent below normal, with the exception of the departments of Canelones, Montevideo and the south of Maldonado.

It is expected that rainfall will be around the seasonal average in the three-month period September-November.

Preliminary rice production estimates have been revised downwards

Maize and sorghum harvests were completed in June. Output fell about 23 percent below the harvest forecasts to 270 000 tonnes. The decline in production was caused by the severe drought affecting the agricultural departments of Colonia and Soriano during the grain sowing period.

The water deficit led to a reduction in the total number of hectares sown (just over 87 000 compared with the 112 000 hectares announced at the beginning of the agricultural season). Many farmers also chose to harvest and store the grain as feedstock to avoid greater losses, directly affecting average yields.

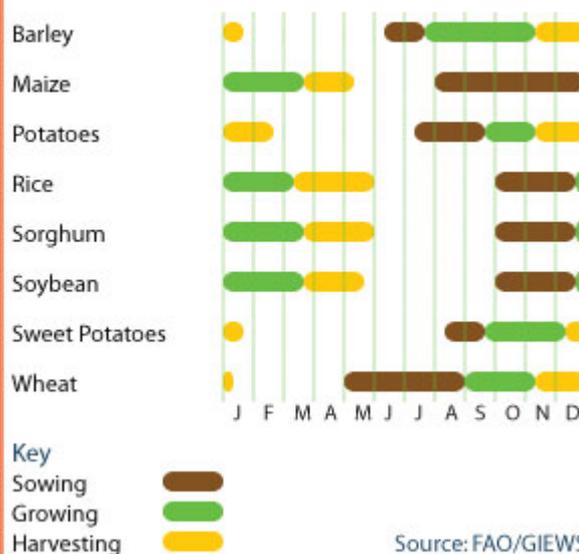
Yields of sorghum, on the other hand, which is best able to stand a lack of water and can also be sown later, reached record average levels of 4764 kg/ha. Output should therefore reach 324 000 tonnes which should also prove to be a record high, because of the sharp increase in the hectares sown.

Winter wheat production should match last season's record levels

The 2009 winter wheat sowing season has been completed in the production departments of Colonia, Soriano, Río Negro and Paysandú. In view of the good prospects for this cereal and low production costs it is expected that the same, or even more, hectares should be sown than in 2008.

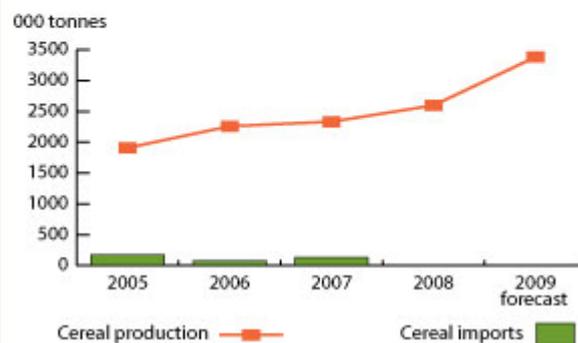
The decline in production costs is partly due to the lower prices of urea (about 48 percent) and phosphate fertilisers (approximately 50 percent) compared with the prices in the same period of 2008.

Crop calendar Uruguay



Cereal production and imports Uruguay

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes		percent	
Rice (milled)	874	931	901	-3.2%
Wheat	609	750	1400	86.7%
Barley	360	410	380	-7.3%
Other	359	508	703	38.4%
Total Cereals	2250	2599	3384	30.2%



Source: FAO/GIEWS Country Cereal Balance Sheets

Wheat flour prices continue to fall

Domestic retail prices of wheat flour, as a result of wheat surpluses harvested, remain below the levels recorded during the mid-2008 food crisis although in recent months they have shown signs of rising again.

Conversely, even though rice prices have fallen slightly in recent months, thanks to last season's good harvest, they still stand at around 20 pesos/kg which is the highest price recorded in the past two years.

