



GIEWS Country Brief The Republic of El Salvador

Reference Date: 19-June-2023

FOOD SECURITY SNAPSHOT

- Dry weather conditions affecting ongoing planting of 2023 main maize crops
- Cereal import requirements, mostly yellow maize and wheat, anticipated at high levels in 2022/23
- Prices of white maize and red beans above year-earlier levels in May

Dry weather conditions affecting ongoing planting of 2023 main maize crops

Planting of the 2023 main season maize crops started in June, with a delay of one month, and it is ongoing at a slow pace due to soil moisture deficits. Satellite imagery indicates poor crop conditions in central and eastern areas (red areas in VHI map), where maize cultivation is concentrated. Planted area to the main maize crop is forecast at a below-average level, due to the current dryness as well as to persistently high production costs, albeit lower year-on-year. However, precipitation amounts are forecast to increase from July onwards, which is likely to have positive effects on yields. Rainfall during the third trimester is forecast to be near average. In addition, if the current soil moisture deficit is fully covered by improved rains in the coming months, it is likely that sowings of second season crops, expected to take place in September, will increase.

In order to improve production capacity of smallholder farmers, the Ministry of Agriculture and Livestock is distributing free maize seeds and fertilizers [to more than 500 000 farmers, with a total budget of USD 38 million](#).

Cereal import requirements, mostly yellow maize and wheat, anticipated at high levels in 2022/23

Cereal import requirements in the 2022/23 marketing year (September/August) are anticipated at high levels of 1.2 million tonnes. The high level mainly reflects strong demand of wheat for human consumption and maize by the feed industry.

Prices of white maize and red beans above year-earlier levels in May

Prices of white maize weakened between March and May 2023, due to improved supply from larger year-on-year imports during the first four months of the year. However, prices in May were still

El Salvador

Crop Calendar

(*major foodcrop)

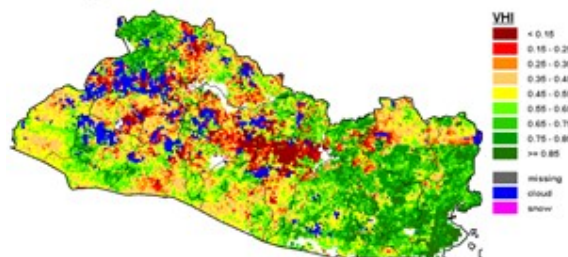


Lean period



El Salvador - Vegetation Health Index (VHI)

Dekad 1, June 2023



El Salvador

Cereal Production

	2018-2022	2022	2023	change
	average		forecast	
000 tonnes				
				percent
Maize	795	850	830	-2.4
Sorghum	103	95	90	-5.3
Rice (paddy)	22	16	15	-8.5
Total	920	961	935	-2.7

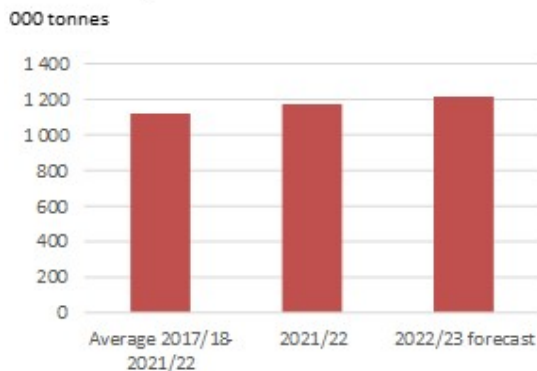
Note: Percentage change calculated from unrounded data.

8 percent higher than one year before, reflecting elevated production and transport costs. Prices of red beans rose in May for the second consecutive month and they were more than 30 percent up from a year earlier, on account of high export quotations of Nicaragua, the country's key bean supplier. Prices of wheat flour have been stable since February 2023, following the recent weakening of international quotations. After sustained increases between September 2021 and January 2023, prices in May were about 10 percent higher year-on-year.

The annual food inflation rate in May 2023 was estimated at 8.4 percent, the lowest in one year, as a result of recent weakening of international quotations of food and fuel.

El Salvador

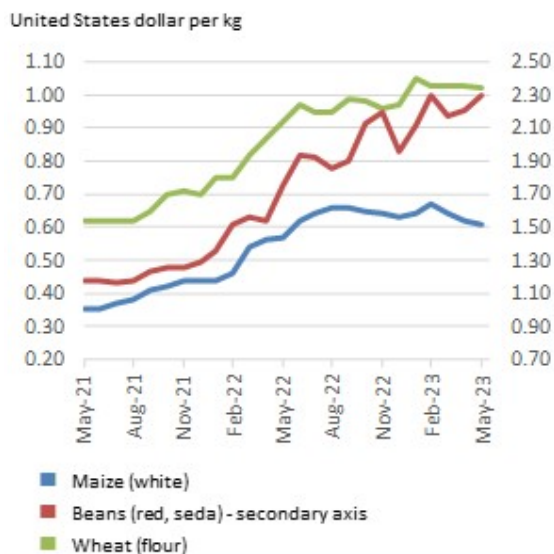
Cereals Imports



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

El Salvador

Wholesale food prices in San Salvador



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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/>.



GIEWS Country Brief El Salvador

Reference Date: 19-August-2022

FOOD SECURITY SNAPSHOT

- Conditions of 2022 main maize crop generally favourable
- Cereal import requirements in 2022/23 anticipated at slightly above-average levels driven by strong demand
- Prices of white maize and red beans well above their levels a year earlier in July
- High international prices of food and fertilizers are likely to affect food insecurity levels

Conditions of the 2022 main maize crop generally favourable

The 2022 main season maize crop is at flowering and grain-filling stages and will be harvested from September. Good seasonal rains between April and mid-June bolstered initial prospects for yields, which were slightly curbed by reduced precipitation in July. Although there is no official estimate on planted area of the main season crops, the association of small and medium producers [estimated](#) sowings had declined year on year, on accounts of high costs of agricultural inputs. To contain negative effects of rising production costs, the government [distributed](#) certified maize seeds and fertilizers to 600 000 farmers. In addition, in June 2022 the National Assembly approved a new temporary function of the government-affiliated National Centre for Agricultural and Forestry Technology (CENTA) to guarantee availability of agricultural inputs, applicable until the end of 2023. CENTA will directly purchase fertilizers and sell to farmers at a discounted price, and the [first purchase of 10 000 tonnes of fertilizers](#) is planned.

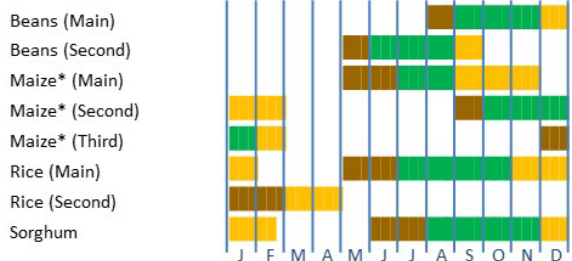
According to satellite imagery, as of early August, conditions of the main maize crop are generally favourable (see green areas in VHI map) except some localized areas in the western part of the country. Weather forecasts point to the above-average precipitation in the August-October period and an active hurricane season, which lasts until November. If torrential rains materialize at the crop maturation or harvest period, it is likely to affect yields. However, abundant precipitation in August could favour land preparation of the 2022 minor season crops.

Cereal import requirements in 2022/23

El Salvador

Crop Calendar

(*major foodcrop)



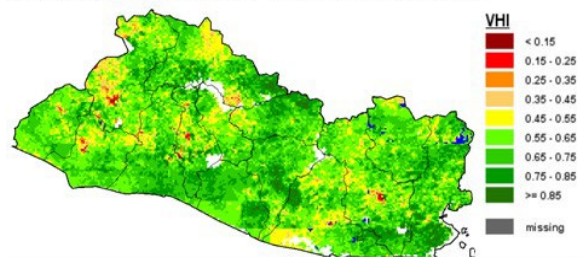
Lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

El Salvador - Vegetation Health Index (VHI)

from start of season 1 to dekad 1, August 2022



Source: FAO/GIEWS Earth Observation System.

anticipated at slightly above-average levels driven by strong demand

Cereal import requirements in the 2022/23 marketing year (September/August) are forecast at slightly above-average levels, reflecting the strong demand for wheat for human consumption and maize by the feed industry. However, elevated international prices of cereals could constrain the domestic demand.

Prices of white maize and red beans well above their levels a year earlier in July

Prices of white maize, which have been strengthening since early 2021, continued to rise at a sharper rate in 2022 due to rapid increases in production costs, including fertilizers and fuel. As of July 2022, prices were more than 70 percent higher year on year. Similarly, prices of red beans also rose during the first seven months of 2022 and were 65 percent above their year-earlier levels. Rice prices, after being held steady in 2021, increased in the second quarter of 2022. High export quotations in the country's key suppliers of beans (Nicaragua) and rice (the United States of America) exerted additional pressure on prices in domestic markets.

High international prices of food and fertilizers are likely to affect food insecurity levels

Fertilizer supply mostly originates from China and the Russian Federation. Imports between January and June 2022 were nearly [25 percent lower](#) compared to the same period in the previous three years. The reduced imports mainly reflect high prices of fertilizers and restricted export availability from the key producing countries. The association of producers has [promoted](#) the use of organic fertilizers to lower dependency on mineral fertilizers. If imports of fertilizers remain at a low level for the remainder of 2022, its reduced application could constrain attainable yields.

Food prices have generally increased since August 2021, with the annual food inflation rate estimated at [14.2 percent in July 2022](#), up from 0 percent in the same month last year. Amid increasing food prices, the government [eliminated](#) tariffs on imports of 20 basic food items, including rice, sugar, beans, maize and wheat flour/grains, tomatoes, onions, cooking oil as well as fertilizers, from March 2022 for a period of one year. High levels of staple food are highly likely to diminish the purchasing power of vulnerable households and constrain their access to food, with negative effects on food security.

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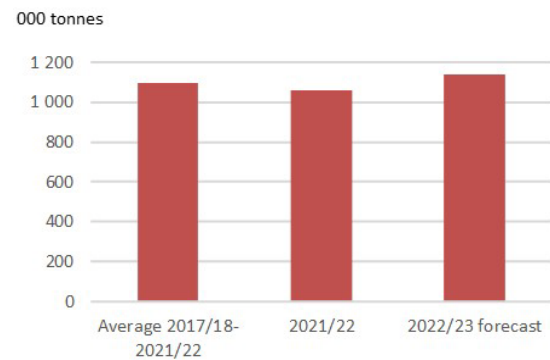
Cereal Production

	2017-2021	2021	2022	change
	average		forecast	2022/2021
000 tonnes				
Maize	834	881	850	-3.5
Sorghum	106	110	105	-4.5
Rice (paddy)	26	24	22	-8.3
Total	966	1 015	977	-3.8

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

El Salvador

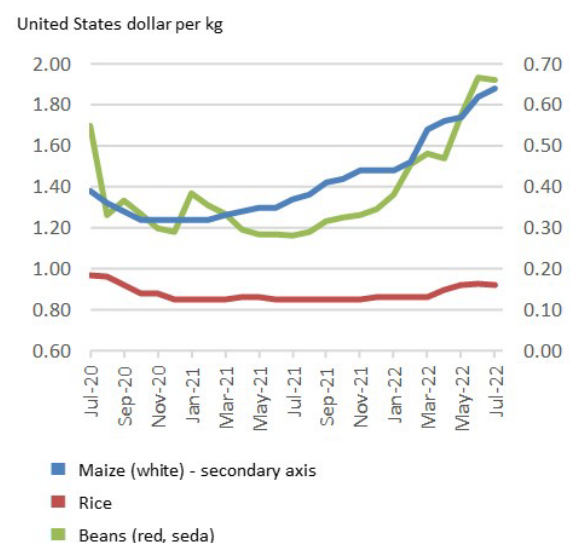
Cereals Imports



Notes: 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.

El Salvador

Wholesale food prices in San Salvador



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



GIEWS Country Brief El Salvador

Reference Date: 18-October-2021

FOOD SECURITY SNAPSHOT

- Maize production in 2021 anticipated at above-average level
- Cereal import requirements in 2021/22 forecast slightly above average
- Prices of white maize more than 15 percent higher year on year in September

Maize production in 2021 anticipated at above-average level

Planting of the 2021 minor season maize crop is ongoing in the eastern region, where this season's production is concentrated. Soil moisture conditions are currently adequate and rainfall amounts are forecast at average levels in the November 2021 to January 2022 period, raising yield prospects. According to official forecast, the planted area with the minor season maize crop is expected to exceed the average, as farmers are encouraged to expand plantings by high prices of the grain and good soil moisture.

The harvest of the 2021 main season maize crop was completed at the end of September. Production is officially estimated at 880 000 tonnes, well above the average due to large plantings and above-average yields. Although the temporal distribution of seasonal rains was mostly erratic, the accumulated rainfall amounts were near the average and favoured a normal crop development. The government distributed improved seeds and fertilizers to about 400 000 farmers. Overall, the 2021 maize production is anticipated at an above-average level of 1.1 million tonnes, including a forecast of the output of the minor season crops.

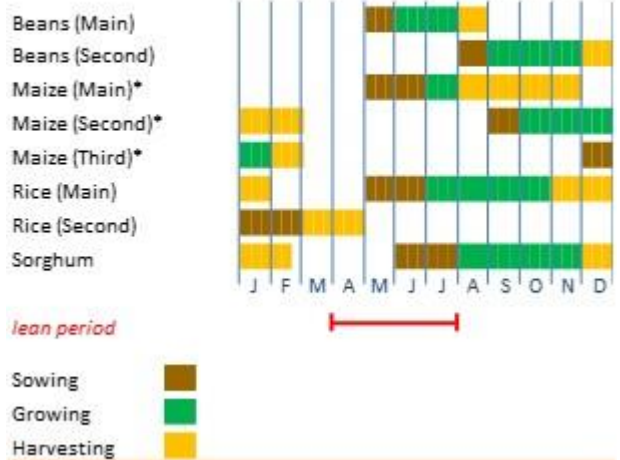
Cereal import requirements in 2021/22 forecast slightly above average

Cereal import requirements in the 2021/22 marketing year (September/August) are forecast at about 1.1 million tonnes, slightly exceeding the five-year average. The requirements of maize imports, which account for about two-thirds of total imports, are anticipated at average levels. Regarding wheat, the country entirely depends on imports to cover the domestic demand for human consumption. Wheat imports requirements in 2021/22 are forecast slightly above the average as the strong annual domestic demand is partially offset by large carryover stocks from a year earlier.

El Salvador

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

El Salvador

Cereal Production

	2016-2020	2020	2021	change
	average			2021/2020
000 tonnes				
				percent
Maize	845	886	986	11.4
Sorghum	109	105	110	4.4
Rice (paddy)	27	28	35	24.5
Total	981	1 019	1 131	11.0

Note: percentage change calculated from unrounded data.

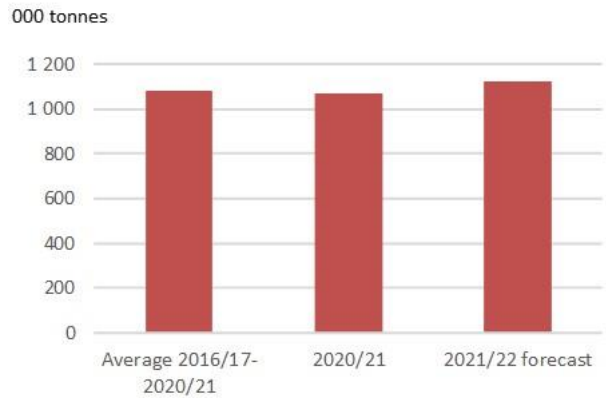
Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of white maize more than 15 percent higher year on year in September

Prices of white maize have been increasing from March to September 2021 on account of high production and transportation costs. As of September, prices were 18 percent higher year on year. With commercialization of the 2021 main season harvests, prices are expected to decline from October onwards. Prices of red beans have been generally stable during the third quarter of 2021 and were below their year-earlier levels as markets were adequately supplied by the good harvests and large imports in 2020. Prices of rice held steady since January 2021 and, in September, were lower than their high levels a year earlier, when prices increased following trends in the international markets.

El Salvador

Cereals Imports

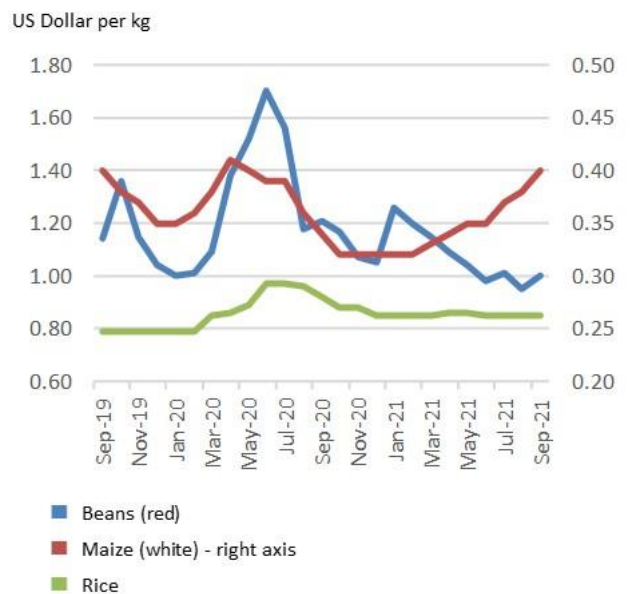


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

El Salvador

Wholesale food prices in San Salvador



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



GIEWS Country Brief El Salvador

Reference Date: 27-April-2021

FOOD SECURITY SNAPSHOT

- Land preparation for sowing of 2021 main season maize crop ongoing
- Cereal production in 2020 officially estimated at above-average level
- Cereal import requirements in 2020/21 forecast at high levels
- Prices of white maize nearly 15 percent lower year on year in March

Land preparation for sowing of 2021 main season maize crop ongoing

Ahead of the start of the 2021 main season maize crop, land preparation is ongoing under favourable weather conditions. The weather forecast points to average precipitation and temperature in the May-July period, which coincides with crop development and flowering stages, boosting prospects for crop yields. In early April, Central American locusts (*Schistocerca gregaria*) were reported in the central department of San Vicente, but the implementation of timely measures by the Ministry of Agriculture successfully controlled the outbreak.

Cereal production in 2020 officially estimated at above-average level

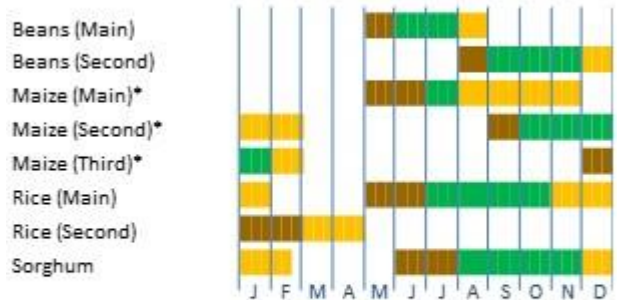
The 2020 cereal production is officially estimated at a well above-average level of 1 million tonnes, with maize accounting for nearly 90 percent. The above-average maize output in 2020 is mainly due to excellent yields, reflecting favourable weather conditions. The passage of Tropical Storm Amanda in June 2020 and hurricanes Eta and Iota in November 2020 had only a marginal impact on maize crop production. The 2020 sorghum production is estimated at 105 000 tonnes, a slightly below-average level due to the reduced planted area in favour of more profitable crops.

Production of beans in 2020 is estimated at 132 500 tonnes, with a year-on-year increase of about 30 percent. The large output reflects above-average yields, which were obtained partially due to the use of improved seeds that were distributed by the Ministry of Agriculture to about 223 000 farmers.

El Salvador

Crop Calendar

(*major foodcrop)



lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS.

El Salvador

Cereal Production

	2015-2019	2019	2020	change
	average			estimate
000 tonnes				
Maize	813	795	886	11.3
Sorghum	108	109	105	-3.4
Rice (paddy)	32	28	35	25.0
Total	953	933	1 026	10.0

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements in 2020/21 forecast at high levels

Cereal import requirements in the 2020/21 marketing year (September/August) are forecast at about 1.1 million tonnes, slightly above the average level. The requirements are anticipated to decline year on year, reflecting the good output gathered in 2020 and large carryover stocks. Regarding wheat, the country entirely depends on imports to cover the domestic demand for human consumption and wheat imports in 2020/21 are forecast at about 340 000 tonnes.

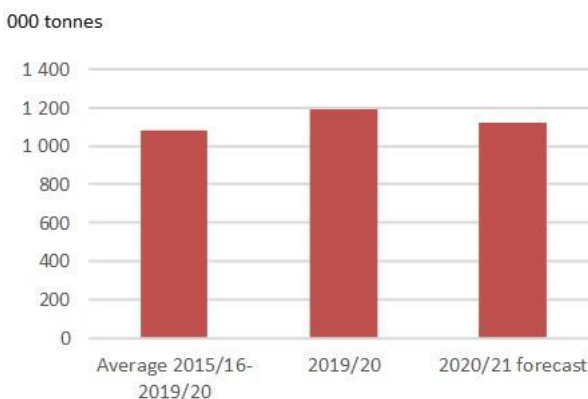
Prices of white maize nearly 15 percent lower year on year in March

After remaining stable in the last four months, prices of white maize started to strengthen in March 2021. Prices were nearly 15 percent below their levels a year earlier, reflecting large market supplies from the above-average 2020 harvests. Prices of red beans declined in March 2021 for the second consecutive month, following large imports between December 2020 and February 2021. However, prices were about 7 percent higher year on year, mainly reflecting the high level of prices in Nicaragua, the country's major supplier. Prices of rice were stable in March and near their year-earlier levels.

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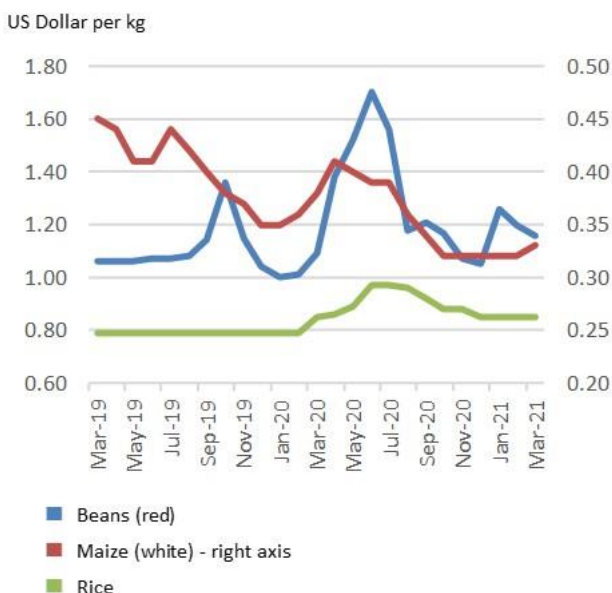
Cereals Imports



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.

El Salvador

Wholesale food prices in San Salvador



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



GIEWS Country Brief El Salvador

Reference Date: 20-August-2020

FOOD SECURITY SNAPSHOT

- Maize output in 2020 forecast at above-average level due to good yields
- Cereal import requirements in 2020/21 forecast at above-average level
- Following upsurge in March-June period, prices of red beans and rice remained well above year-earlier levels

Maize output in 2020 forecast at above-average level due to good yields

Harvesting of the 2020 main season maize crop, which accounts for about 80 percent of the annual production, is ongoing under favourable weather conditions. Good yields are expected as favourable rainfall in the May-July period benefitted crop development. The passage of Tropical Storm Amanda in early June did not have a severe impact on the maize crop and the affected crops in the western region were successfully replanted within the planting window. In order to boost production of the 2020 main maize crop, the Ministry of Agriculture distributed free seeds and fertilizers across the country between the end of April and early June to 400 000 farmers, marking an annual increase in beneficiaries of 30 percent. Although there is no official estimate of plantings, high domestic prices and good soil moisture during the planting period are likely to have instigated an increase in the area.

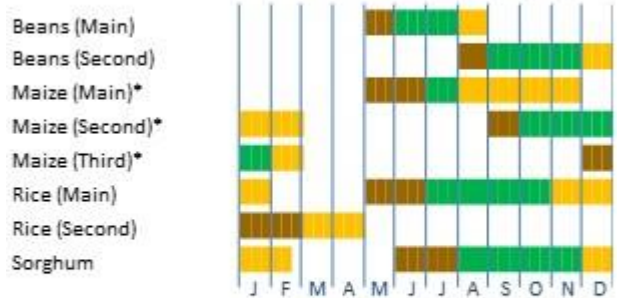
Planting operations of the 2020 minor season maize crop, to be harvested in November and December, are underway. The localized outbreak of Central American locusts (*Schistocerca piceifrons*) in the central and eastern regions was successfully contained as of mid-August due to effective control measures and no major crop losses were reported. Assuming normal minor season conditions, the aggregate 2020 maize output is forecast at 920 000 tonnes, about 10 percent higher than the previous five-year average.

The Ministry of Agriculture started the free distribution of improved bean seeds in mid-August for ongoing planting operations of the main bean season. The target is expected to reach 223 000 farmers across the country.

El Salvador

Crop Calendar

(*major foodcrop)



lean period



Source: FAO/GIEWS.

El Salvador

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	828	870	920	5.7
Sorghum	108	110	120	9.1
Rice (paddy)	33	35	29	-17.1
Total	969	1 015	1 069	5.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements in 2020/21 forecast at above-average level

Cereal import requirements in the 2020/21 marketing year (September/August) are forecast at about 1.2 million tonnes, 6 percent above the previous five-year average, reflecting a sustained demand for yellow maize from the poultry sector. The forecast requirements are anticipated to decline slightly from the previous year, when about 50 000 tonnes of white maize were imported as strategic reserves in response to soaring market prices in the March-April period due to the COVID-19 pandemic. In addition, imports of white maize are forecast to decline year on year due to the good output expected in 2020. Regarding wheat, the country entirely depends on imports to cover the domestic demand for human consumption and wheat imports in 2020/21 are forecast at a slight above-average level of 340 000 tonnes.

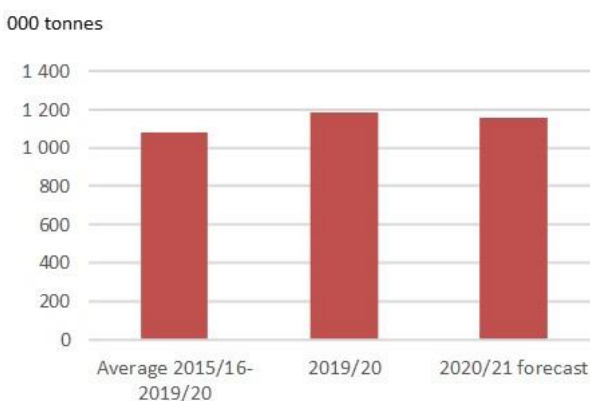
Following upsurge in March-June period, prices of red beans and rice in July remained well above year-earlier levels

Prices of white maize declined for the third consecutive month in July reflecting a return to normal levels of domestic demand, after the exceptionally high levels that exerted upward pressure on prices in the March-April period. As of July 2020, prices were 11 percent below their year-earlier levels due to the good 2019 output, compounded by favourable production prospects for the 2020 main maize crop. With regard to red beans, prices increased sharply from March to June reflecting the upsurge in retail demand and high prices in Nicaragua, the main supplier of red beans during the lean season. In July, prices decreased due to the weakened domestic demand but remained more than 45 percent higher year on year. Prices of rice also increased in the March-June period and were 22 percent higher than in July 2019.

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El Salvador

Cereals Imports

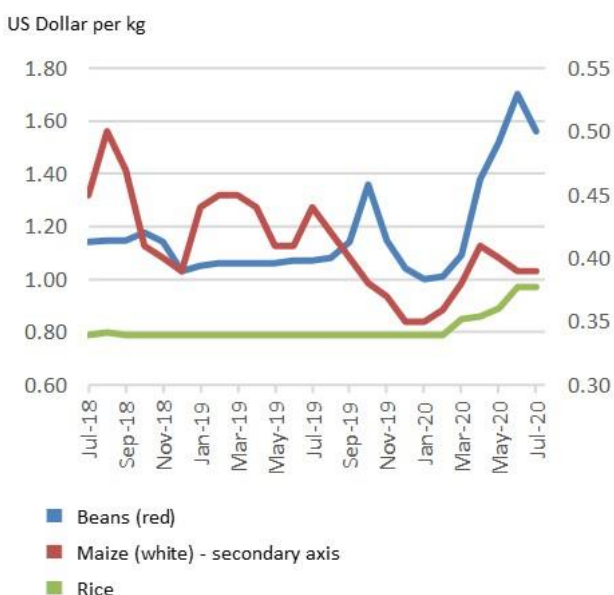


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

El Salvador

Wholesale food prices in San Salvador



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



GIEWS Country Brief El Salvador

Reference Date: 05-May-2020

FOOD SECURITY SNAPSHOT

- Forecasts of adequate seasonal rains increase prospects for 2020 main season maize crop
- Cereal production in 2019 estimated at average level
- Cereal import requirements in 2019/20 forecast slightly above average
- Prices of maize, red beans and rice increased in March amid COVID-19 pandemic

Forecasts of adequate seasonal rains increase prospects for 2020 main season maize crop

Land preparation of the 2020 main season maize crop is ongoing across the country and planting operations will start in mid-May. The current pre-rainy season, characterized by downpours and thunderstorms, will continue until mid-May, when the start of seasonal rains is officially forecast. Precipitations during the May-July period are forecast to be adequate and are expected to benefit yields. The Ministry of Agriculture started the free distribution of maize seeds and fertilizers in the Western Region, where the onset of the rains is earlier than in other parts of the country. As an effort to boost production, the Government has increased the number of beneficiaries by 30 percent compared to the previous year, targeting 400 000 farmers.

Cereal production in 2019 estimated at average level

Production of cereal in 2019 is estimated at an average level of 955 000 tonnes, more than 85 percent of which corresponds to maize. The maize output increased from the drought-affected output in 2018 and remained at near-average levels. An increase in plantings due to high prices and beneficial weather conditions at planting time was offset by low yields due to dry weather conditions during the critical flowering and grain-filling phases. Sorghum production in 2019 is estimated at a below-average level of 100 000 tonnes due to torrential rains in October that negatively affected yields. In addition, plantings of sorghum have declined as the feed industry is shifting to imported yellow maize, lowering demand for locally-produced sorghum.

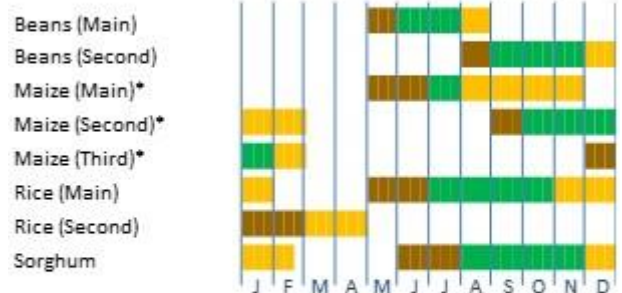
Cereal import requirements in 2019/20 forecast slightly above average

Cereal import requirements in the 2019/20 marketing year (September/August) are forecast at about 1.1 million tonnes, slightly above the previous five-year average, reflecting a

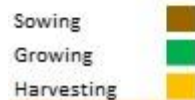
El Salvador

Crop Calendar

(*major foodcrop)



lean period



Source: FAO/GIEWS.

El Salvador

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	809	686	820	19.6
Sorghum	115	109	100	-8.5
Rice (paddy)	34	34	35	3.2
Total	958	829	955	15.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

sustained demand for yellow maize from the poultry sector. Imports of white maize are forecast to decline compared to the record level of the previous year, when import demand was high due to the low outputs gathered in 2018. The import forecasts include 50 000 tonnes of white maize that [the Government purchased as strategic reserves](#) in March 2020. The country entirely depends on imports to cover the domestic demand of wheat for human consumption and imports in 2019/20 are anticipated at an average level of 340 000 tonnes.

Prices of maize, red beans and rice increased in March amid COVID-19 pandemic

Overall, prices of red beans, white maize and rice increased in March due to hoarding and panic-buying by households amid the COVID-19 pandemic. Prices of white maize increased for the third consecutive month in March as seasonal upward pressures were exacerbated by concerns over the pandemic. However, prices were more than 10 percent lower than a year earlier, reflecting a year-on-year increase in production. With regard to red beans, prices rebounded in March after the sharp declines during the last quarter of 2019, when the main season harvest increased market supplies. Prices of rice also increased in March, after a long period of stability.

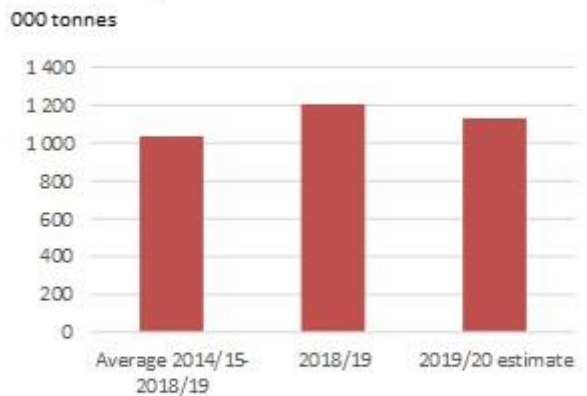
COVID-19 and measures adopted by the Government

In order to guarantee food supplies, the Government temporarily [suspended import duties](#) on wheat flour, maize flour, red beans and rice on 20 March 2020. In addition, national strategic reserves were [strengthened by imports](#) of 50 000 tonnes of white maize, 7 000 tonnes of rice and 5 000 tonnes of beans. The Ministry of Agriculture emphasized that the imported commodities will not compete with the national harvests and will be released only in case of need. As a response to the soaring prices, [price ceilings were introduced](#) on essential food commodities, including grains, fruits, vegetables, eggs, milk powder and oil.

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El Salvador

Cereals Imports

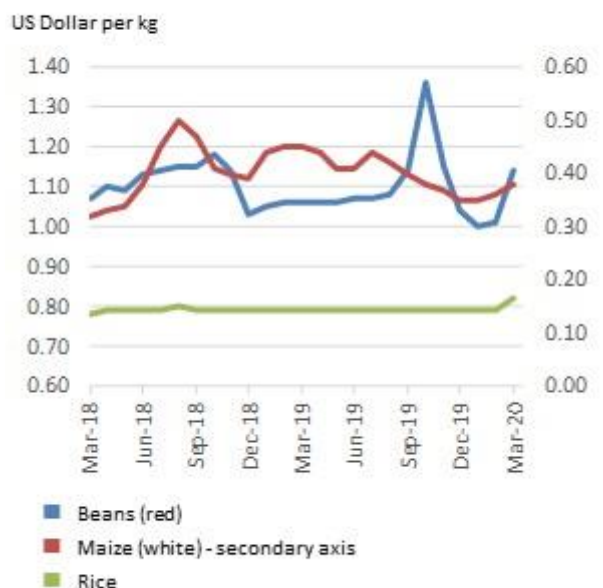


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

El Salvador

Wholesale food prices in San Salvador



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



GIEWS Country Brief El Salvador

Reference Date: 28-October-2019

FOOD SECURITY SNAPSHOT

- Maize production in 2019 expected at near-average level
- Cereal import requirements in 2018/19 forecast to increase
- In October, prices of maize and beans higher than year-earlier levels

Maize production in 2019 expected at near-average level

Harvesting of the 2019 main season maize crop, which accounts for about 80 percent of the annual production, finalized in late September. The season was characterized by heavy rains that were more than 50 percent above the long-term average at the planting period in May, followed by dry weather conditions in the June-July period, which corresponds to crop development and flowering stages. The eastern region experienced some soil moisture deficits, but the impact of reduced rainfall on the main season crops is expected to have a limited impact at the national aggregate level, as maize production in the east is concentrated in the second season. Production of the 2019 main maize crop is estimated at a near-average level as the negative effects of unfavourable rain on yields have been offset by enlarged plantings, instigated by higher prices at the planting period.

Planting of the 2019 minor season maize crop has recently completed, in early October, with some delay, due to above-average rainfalls in the key producing departments of San Miguel and La Unión. Given favourable weather forecasts until early 2020 and the low probability of an El Niño phenomenon occurrence, production of the minor season maize crop, to be harvested in January, is anticipated to be slightly above the average.

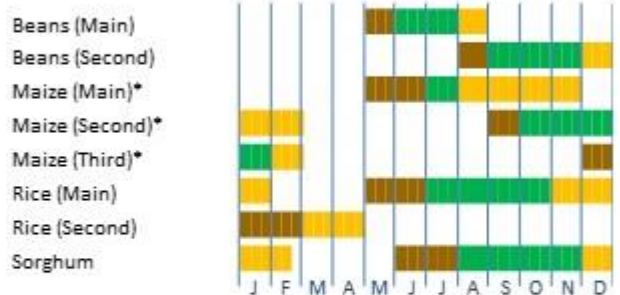
The aggregate 2019 maize production is anticipated at an average level of 835 000 tonnes.

The 2019 sorghum production is anticipated at the below-average level of 100 000 tonnes as torrential rains in September and October negatively affected yields. In addition, plantings of sorghum have declined as the feed industry is shifting to imported yellow maize, lowering demand for locally-produced sorghum.

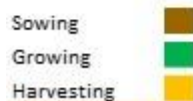
El Salvador

Crop Calendar

(*major foodcrop)



lean period



Source: FAO/GIEWS.

El Salvador

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	827	780	835	7.1
Sorghum	111	90	100	11.1
Rice (paddy)	34	34	35	3.2
Total	972	904	970	7.3

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

Cereal import requirements in 2019/20 forecast at above-average level

Reflecting a sustained demand for yellow maize from the poultry sector, cereal import requirements in the 2019/20 marketing year (September/August) are forecast at an above-average level of 1 million tonnes, 70 percent of which corresponds to maize. The country entirely depends on imports to cover the domestic demand of wheat for human consumption and imports in 2019/20 are anticipated to remain at an above-average level, reflecting the increasing demand.

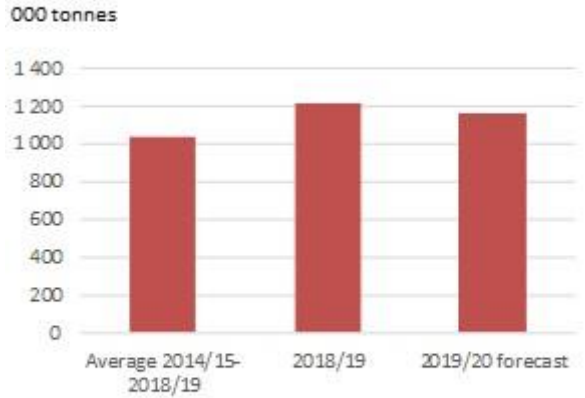
Prices of maize and beans higher than year-earlier levels in October

Prices of white maize started declining last August, with the commercialization of the main season crops and they were 15 percent lower than last year's high levels, strengthened by high fuel and input prices in 2018. In addition, the increase in imports during the first half of 2019 improved supplies in most markets, pressuring down the price levels. Prices of red beans were generally up in September 2019 when they increased sharply due to concerns over the adverse impact of torrential rainfalls on the output of the main season crops.

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El Salvador

Cereals Imports

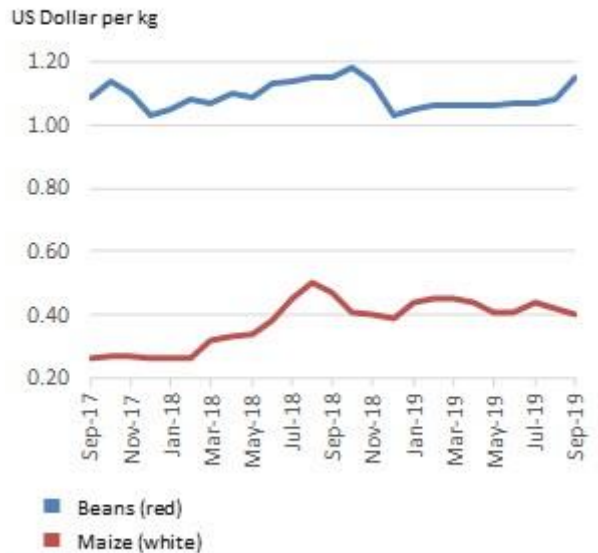


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

El Salvador

Wholesale food prices in San Salvador



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



GIEWS Country Brief El Salvador

Reference Date: 16-November-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 anticipated at below-average level due to prolonged dry spells
- Cereal import requirements in 2018/19 forecast to increase
- Prices of maize and beans higher than year-earlier levels in October

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

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

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

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

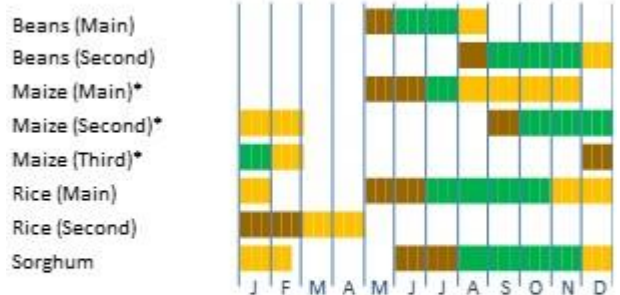
Cereal import requirements in 2018/19 forecast to increase

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

El Salvador

Crop Calendar

(*major foodcrop)



lean period



Source: FAO/GIEWS.

El Salvador

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	845	904	830	-8.2
Sorghum	121	96	95	-1.3
Rice (paddy)	34	26	25	-3.8
Total	1 000	1 026	950	-7.4

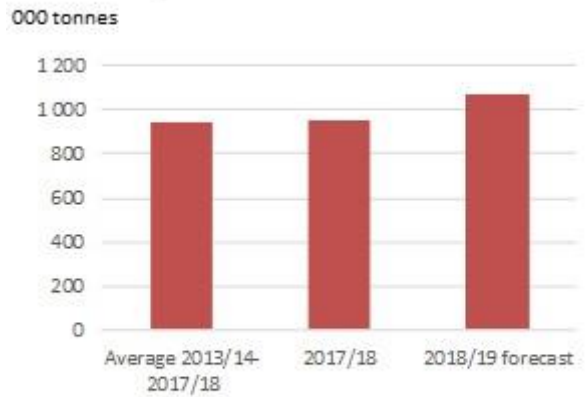
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of maize and beans higher than year-earlier levels in October

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

El Salvador

Cereals Imports

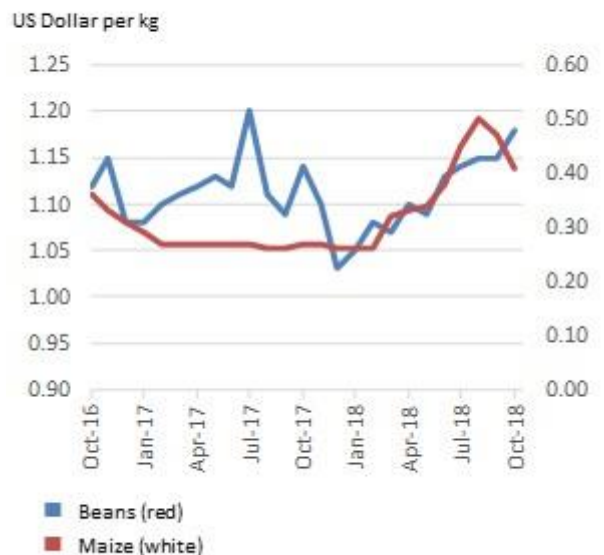


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

El Salvador

Wholesale food prices in San Salvador



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

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GIEWS Country Brief El Salvador

Reference Date: 30-June-2017

FOOD SECURITY SNAPSHOT

- Cereal production in 2017 anticipated to remain at last year's high level
- Cereal imports forecast to sharply decline in 2017/18 marketing year
- Prices of maize and beans remained at low levels in June

Cereal production in 2017 anticipated to remain at last year's high level

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

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

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

Prices of maize and beans remained at low levels in June

Reflecting the 2016 bumper maize crop and the good prospects for the 2017 first season crop, to be harvested from late August, prices continued their declining trend from the previous months in June and were some 37 percent below their level from a year earlier. Prices of red beans, the main staple, were stable in June after increasing the previous month, mainly reflecting imports. Prices, however, remained below their level from a year earlier.



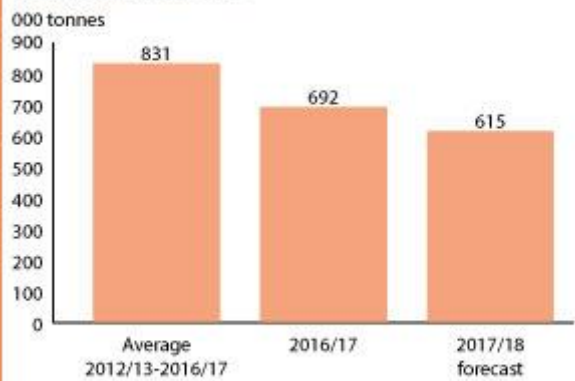
El Salvador
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	841	900	900	0
Sorghum	132	141	140	-1
Rice (paddy)	36	37	38	3
Others	0	0	0	0
Total	1 010	1 078	1 078	0

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

El Salvador

Total cereal imports

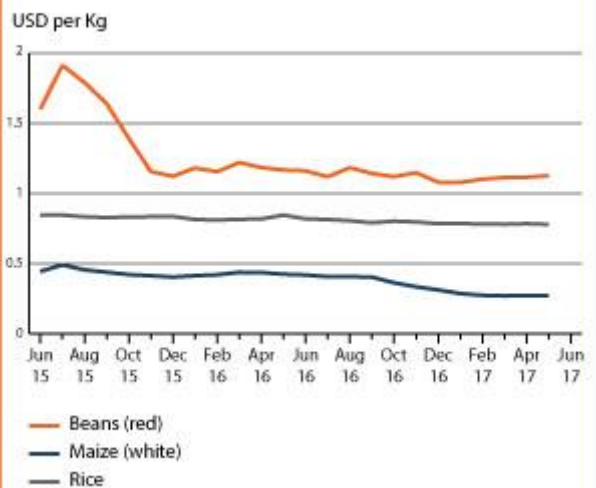


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

El Salvador

Wholesale food prices in San Salvador



Source: Dirección General de Economía Agropecuaria, MAG

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GIEWS Country Brief El Salvador

Reference Date: 27-April-2017

FOOD SECURITY SNAPSHOT

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

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

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

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

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

Cereal imports forecast to decline in 2016/17 marketing year

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



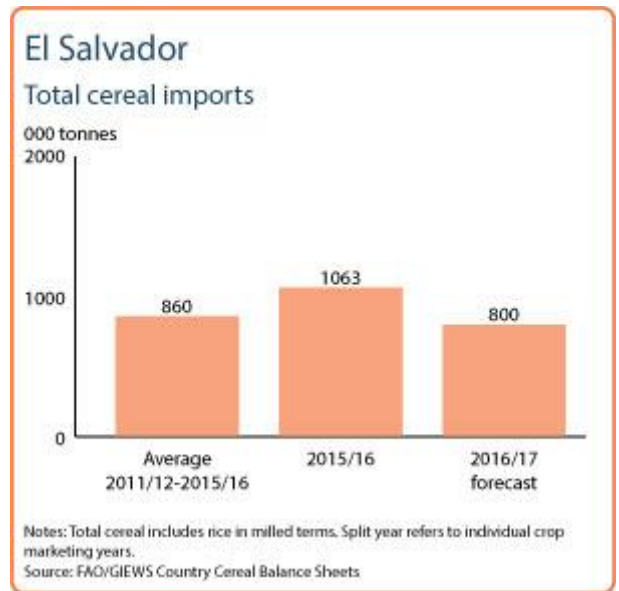
El Salvador Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	841	900	900	0
Sorghum	132	141	140	-1
Rice (paddy)	36	37	38	3
Others	0	0	0	0
Total	1 010	1 078	1 078	0

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

Prices of cereals and beans remained at low levels in March

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





GIEWS Country Brief El Salvador

Reference Date: 02-December-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 anticipated to recover from last year's drought-reduced level
- Cereal imports forecast to decline in 2016/17 marketing year (September/August)
- Maize and rice prices continued to decline in November, while bean prices increased seasonally

Cereal production in 2016 anticipated to recover from last year's drought-reduced level

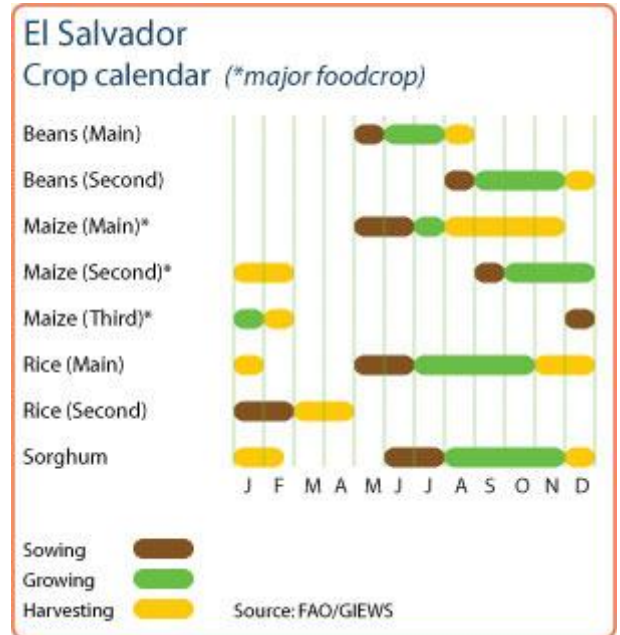
Cereal production in 2016 is forecast to reach 1 million tonnes, a 25 percent increase over last year's drought-reduced level. The anticipated increase in cereal output mainly reflects a recovery in maize production. Harvest of the main "de primera" season, which represents some 60 percent of the annual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

Cereal imports forecast to decline in 2016/17 marketing year

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

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

Wholesale prices of white maize in November continued their declining trend of the previous months and were some 21 percent below their levels from a year earlier reflecting ample supplies from the good main season harvest concluded in October. Rice prices also declined from the previous month and from a year

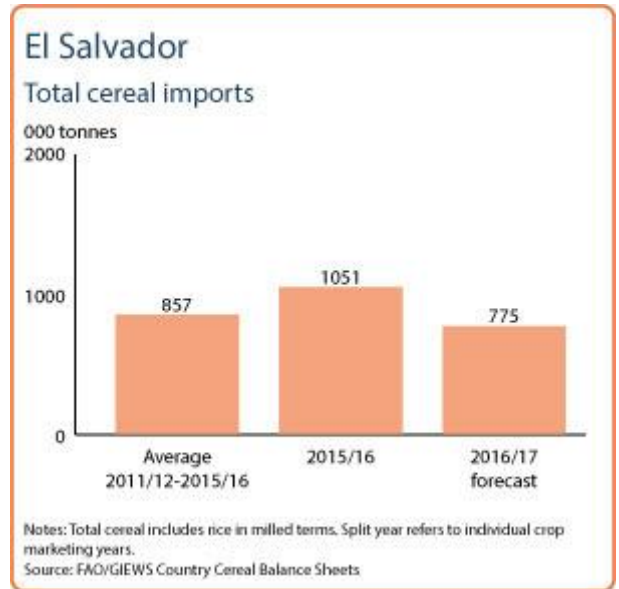


El Salvador
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	814	682	850	25
Sorghum	145	160	141	-12
Rice (paddy)	34	39	37	-5
Others	0	0	0	0
Total	993	881	1 028	17

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

earlier, as supplies from the main season harvest began to supply the markets. By contrast, bean prices increased seasonally, as the harvest of the main season crops will not begin until mid-December. However, prices remain some 17 percent below their year earlier levels, reflecting ample supplies from imports and carryover stocks from the harvest in November.





GIEWS Country Brief El Salvador

Reference Date: 07-October-2016

FOOD SECURITY SNAPSHOT

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

Cereal production in 2016 anticipated to recover from last year's drought-reduced level

Cereal production in El Salvador is forecast to reach 1 million tonnes, a 25 percent increase over last year's drought-reduced level. The anticipated increase in cereal output mainly reflects a recovery in maize production. Harvest of the main "de primera" season, which represents some 60 percent of the annual maize output, is ongoing and will conclude in early October. No official estimates are available for the first season crop, however, prospects are favourable, as precipitation during the season was close to historical levels. Planting of the secondary crop will begin from early October and prospects are also favourable, as weather conditions up to the second half of September have remained good and farmers are receiving inputs from the Government, including seeds and fertilizer. The official forecast points to a 2016 maize crop of 850 000 tonnes, a bumper level. The 2016 rice crop is forecast to decline some 5 percent from last year's good level and reach 37 000 tonnes, as the secondary season was affected by dryness, however, at this level output will remain above average.

Cereal imports forecast to decline in 2016/17 marketing year

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

Maize and bean prices declined moderately in September

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



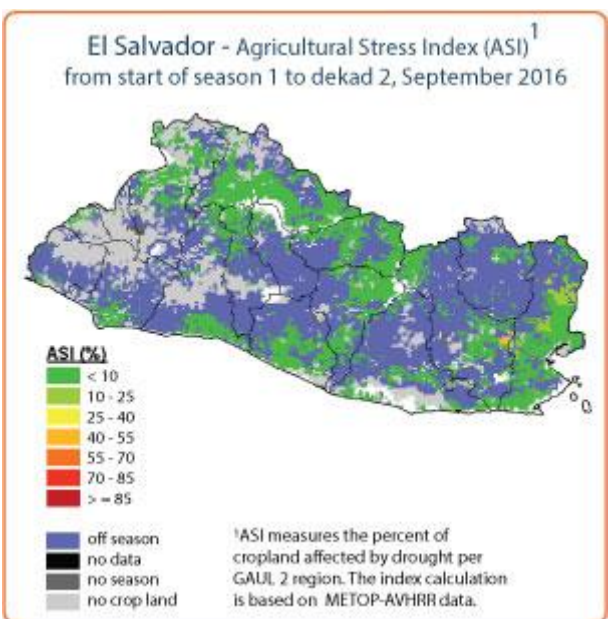
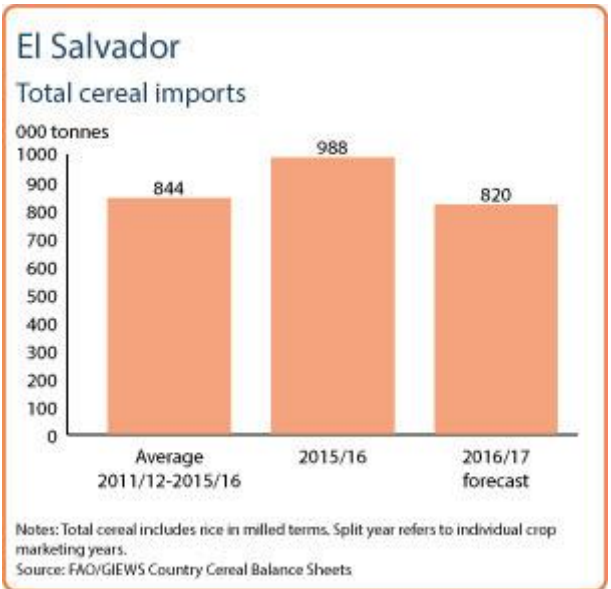
El Salvador
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	802	621	850	37
Sorghum	145	160	141	-12
Rice (paddy)	34	39	37	-5
Others	0	0	0	0
Total	981	820	1 028	25

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

relatively below last year's level as imports continued to supply the markets.

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





GIEWS Country Brief El Salvador

Reference Date: 02-August-2016

FOOD SECURITY SNAPSHOT

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

Cereal production in 2016 anticipated to recover from last year's drought-reduced level

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

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

Cereal imports forecast to decline in 2016/17 marketing year (July/June)

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



El Salvador
Cereal production

	2011-2015	2015	2016	change
	average		forecast	2016/2015
	000 tonnes			percent
Maize	802	621	800	29
Sorghum	145	160	141	-12
Rice (paddy)	34	39	37	-5
Others	0	0	0	0
Total	981	820	978	19

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

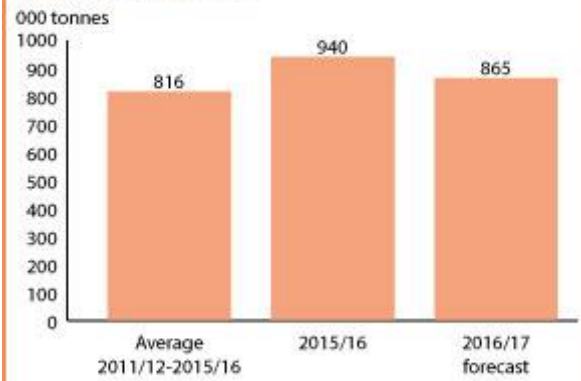
Maize prices remained stable in May, while red bean prices declined

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

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

El Salvador

Total cereal imports



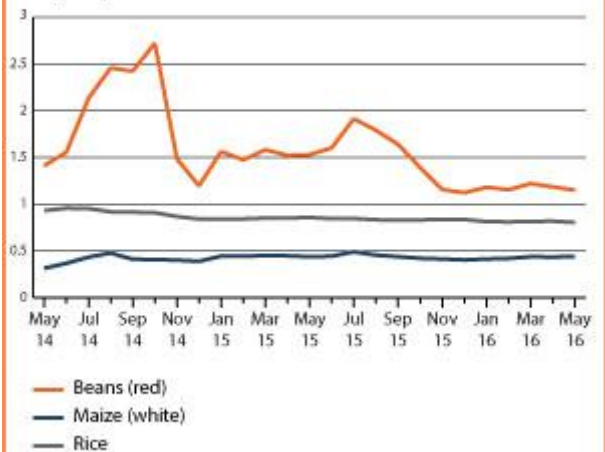
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

El Salvador

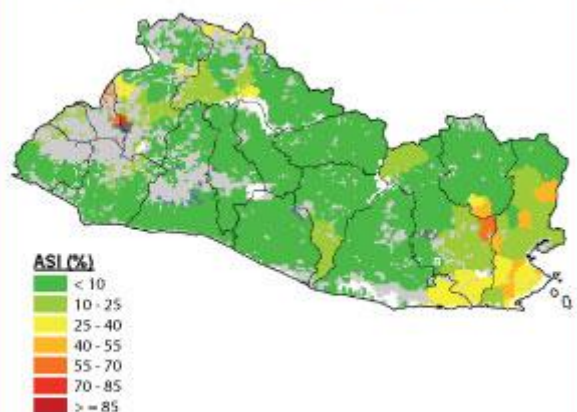
Wholesale food prices in San Salvador

USD per Kg



Source: Dirección General de Economía Agropecuaria, MAG

El Salvador - Agricultural Stress Index (ASI)¹ from start of season 1 to dekad 1, June 2016



ASI (%)

- < 10
- 10 - 25
- 25 - 40
- 40 - 55
- 55 - 70
- 70 - 85
- >= 85

- off season
- no data
- no season
- no crop land

¹ASI measures the percent of cropland affected by drought per GAUL 2 region. The index calculation is based on METOP-AVHRR data.

Reference Date: 30-December-2015

FOOD SECURITY SNAPSHOT

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

Cereal production in 2015 reduced by drought for second consecutive year

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

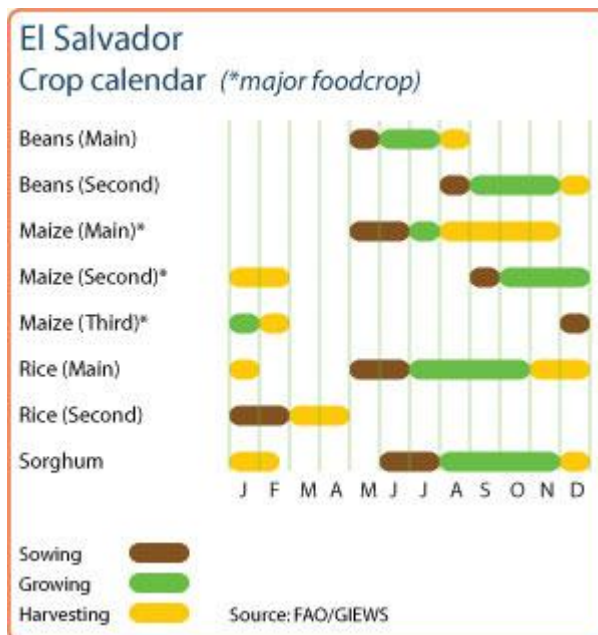
Cereal imports forecast at record levels for 2015/16 marketing year (July/June)

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

Maize and bean prices continue to decline in December

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

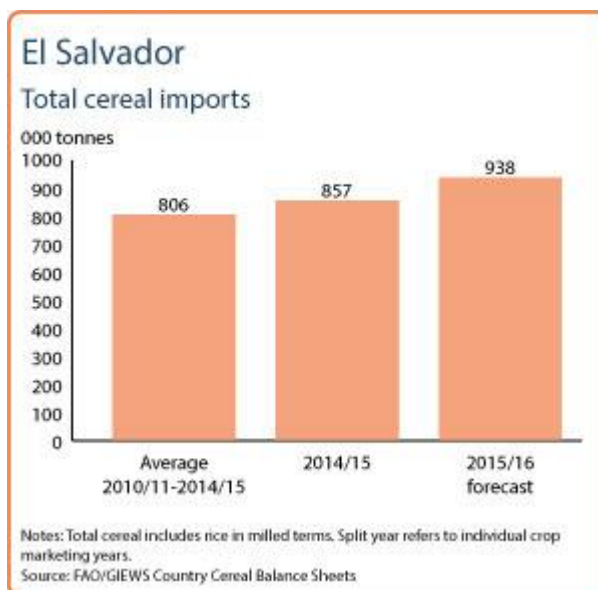
Bean prices in December continued to decline and were below their year-earlier levels. Ample availabilities from recent imports, and supplies from the 2015 first and second season harvests pushed red bean prices down to levels well below those of a year earlier.



El Salvador Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Maize	829	790	650	-18
Sorghum	138	160	160	0
Rice (paddy)	30	27	26	-4
Others	0	0	0	0
Total	998	977	836	-14

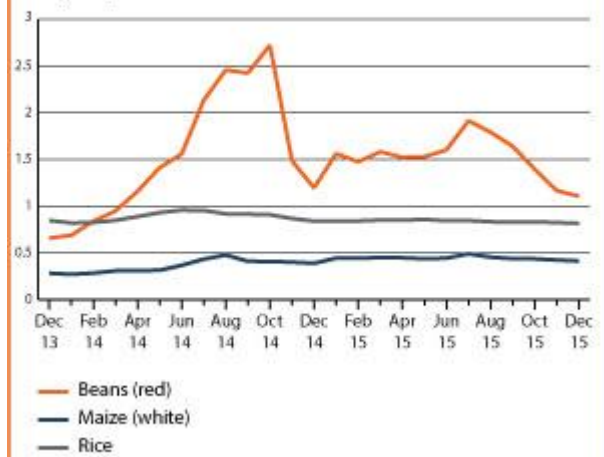
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



El Salvador

Wholesale food prices in San Salvador

USD per Kg



Source: Dirección General de Economía Agropecuaria, MAG

Reference Date: 04-March-2014

FOOD SECURITY SNAPSHOT

- Early estimates point to an increase in 2013 maize and bean production
- Cereal imports forecast to rise in 2013/14 (July/June) on demand from feed sector
- Bean prices surged in February while maize prices remained low

Early estimates point to an increase in 2013 maize and bean production

Harvesting of the 2013/14 second “de postrera” and third “de apante” maize and beans seasons are virtually completed. Good outputs are anticipated due to favourable weather and the Government’s provision of supplemental technology packages in response to reduced yields of the main cropping season “de primera”, gathered until December last year, due to severe dry weather. Preliminary estimates point to a 2013/14 aggregate maize production of 953 000 tonnes, a new record level.

Production of maize in the last two years has been increasing primarily due to the Government’s production support programmes, which consist in the distribution of improved seeds, fertilizers and the provision of extension services.

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

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

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

Bean prices surged in February while maize prices remained low

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

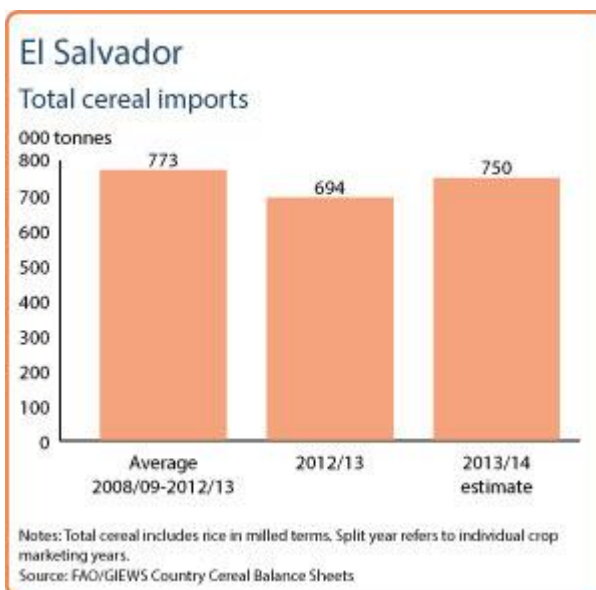
By contrast, wholesale white maize prices seasonally increased 5 percent from January but remained lower than in February 2013. The low maize price reflects the ample supplies in the market from last year’s bumper crop.



El Salvador Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	828	934	952	2
Sorghum	150	140	144	3
Rice (paddy)	30	28	31	11
Others	0	0	0	0
Total	1 008	1 102	1 127	2

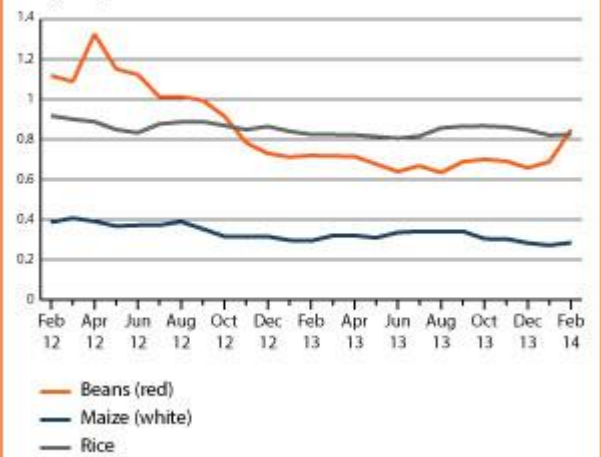
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



El Salvador

Wholesale food prices in San Salvador

USD per Kg



Source: Dirección General de Economía Agropecuaria, MAG

Reference Date: 07-October-2013

FOOD SECURITY SNAPSHOT

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

2013 main season maize production decreases

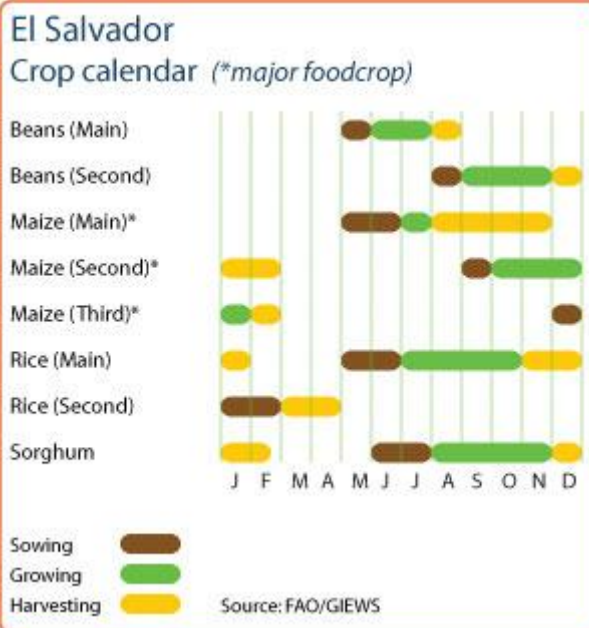
Harvesting of the 2013 main season maize crop has concluded. The prolonged dry weather, known as the canicula, during the month of July, negatively affected yields particularly in the departments of San Miguel, Usulután and Unión, which together account for about 20 percent of national maize production.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

Coffee leaf rust continues to affect food security in rural areas

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

Maize and bean prices at relatively low levels

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



El Salvador Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	828	934	900	-4
Sorghum	150	140	144	3
Rice (paddy)	30	28	31	11
Others	0	0	0	0
Total	1 008	1 102	1 075	-2

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



Reference Date: 17-June-2013

FOOD SECURITY SNAPSHOT

- Cereal production expected to reach new record in 2013
- Coffee leaf rust affects incomes in rural areas
- Cereal imports increase slightly in 2012/13 (July/June)
- Maize and bean prices remain low despite the lean season

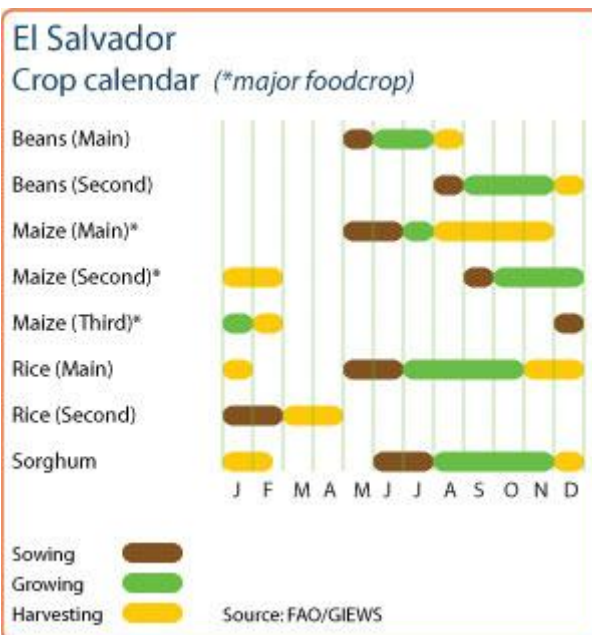
Cereal production expected to further increase in 2013

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

Coffee leaf rust affects incomes in rural areas

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

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

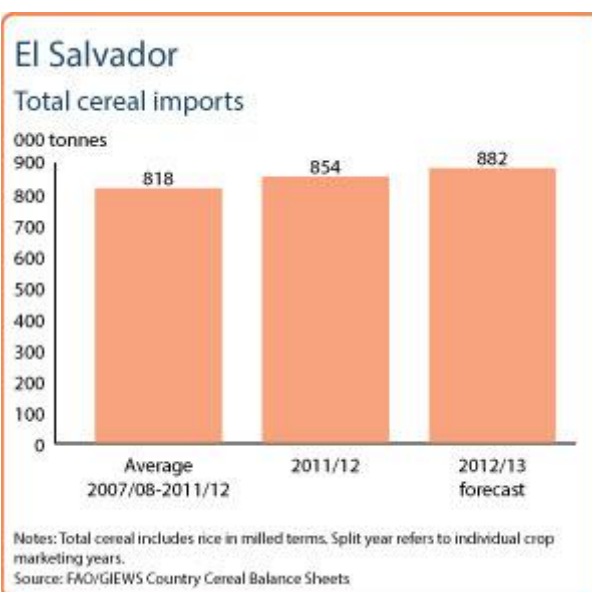


El Salvador

Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	828	934	950	2
Sorghum	150	140	144	3
Rice (paddy)	30	30	31	3
Others	0	0	0	0
Total	1,008	1,104	1,125	2

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



Cereal imports increase slightly in 2012/13 (July/June)

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

Maize and bean prices at low levels

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



Reference Date: 31-May-2012

FOOD SECURITY SNAPSHOT

- Early prospects for the 2012 main season cereal crops are favourable
- Maize and bean prices lower than a year ago

Early prospects for the 2012 main season cereal crops are favourable

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

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

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

Maize and bean prices much lower than a year ago

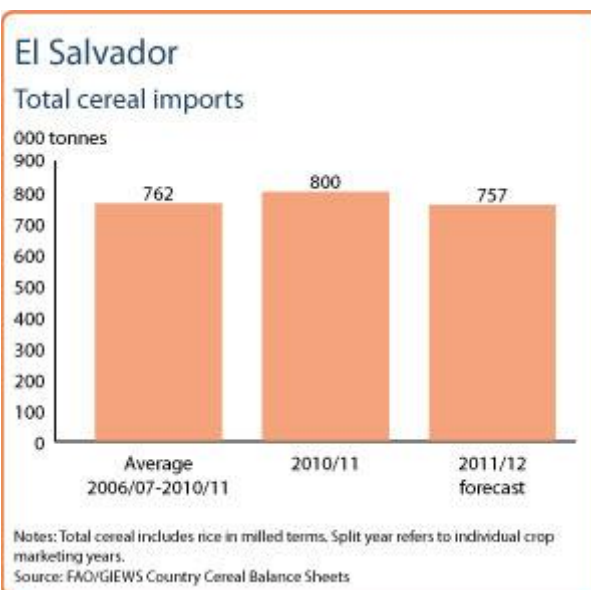
In the market of the capital city, San Salvador, maize prices have stabilized at relatively low levels in the past two months, having dropped sharply in the second half of 2011 when the main harvest came in. In April 2012, maize prices were 17 percent lower than a year earlier. In addition, red bean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



El Salvador Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	783	786	1 000	27
Sorghum	158	134	153	14
Rice (paddy)	30	26	30	15
Others	0	0	0	0
Total	972	946	1 183	25

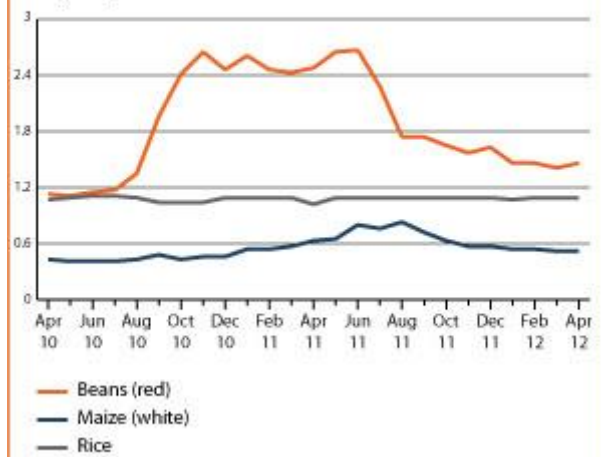
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



El Salvador

Selected retail food prices in San Salvador

USD per Kg



Source: Dirección General de Economía Agropecuaria

Reference Date: 28-February-2012

FOOD SECURITY SNAPSHOT

- 2011 maize production above average despite second season losses
- Bean prices drop with the “de postrera” harvest

Good grain production in 2011 despite losses caused by torrential rainfall in October

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

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

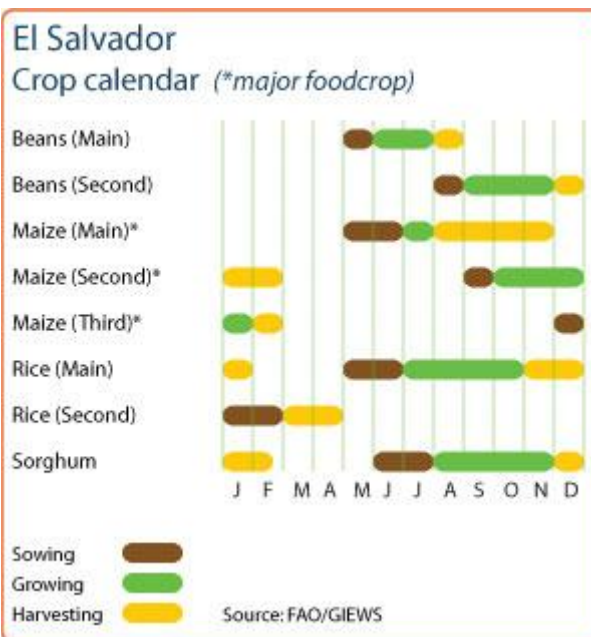
The Government also authorized duty-free importation of 2 300 tonnes of maize and 1 150 tonnes of beans, to guarantee supplies to the population and keep prices stable on local market.

Cereal import requirements to decline in 2011/12 (July/June)

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

Prices of basic foods at record levels

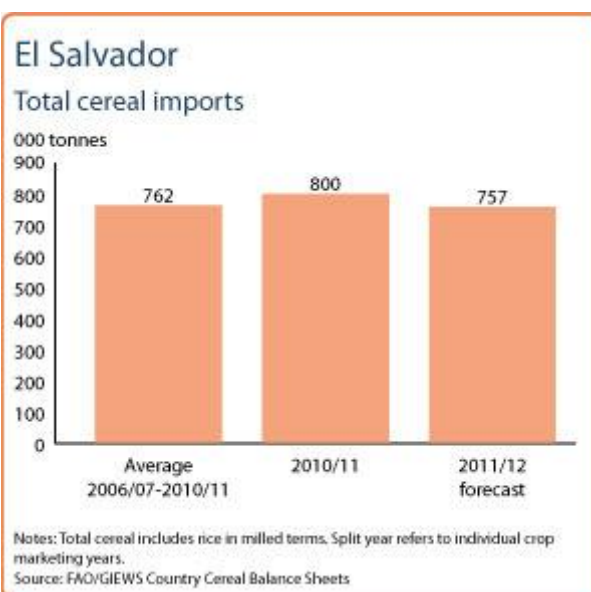
In the national capital, San Salvador, maize and bean prices decreased from their mid-2011 record levels, from September onwards as the 2011 main harvest came in. Prices then dropped further in the new year, in the wake of the government's re-sowing programmes; and in January 2012, bean prices were 44 percent below their January 2011 levels. In the case of maize, of which 40 percent of domestic consumption is imported, prices in January were around the



El Salvador Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	774	777	786	1
Sorghum	164	108	134	24
Rice (paddy)	31	35	34	-3
Others	0	0	0	0
Total	970	920	954	4

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



same levels as a year earlier. Rice prices have remained virtually unchanged over the last two years.



Reference Date: 30-May-2011

FOOD SECURITY SNAPSHOT

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

Sowing prospects uncertain for cereal crops of the 2011 main season

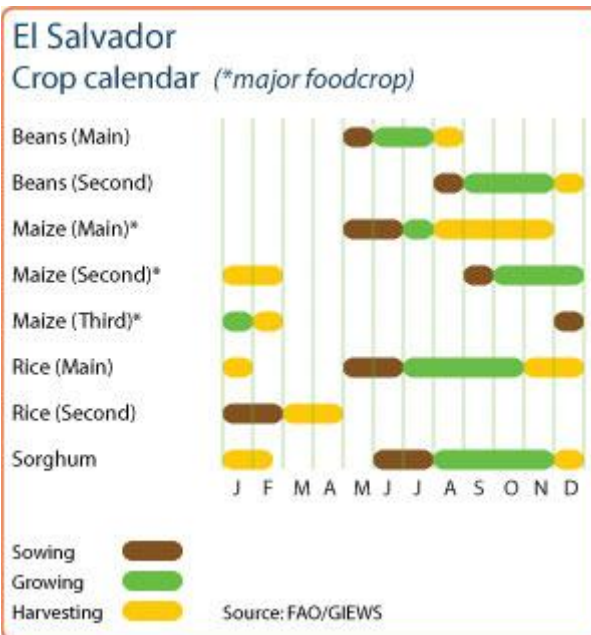
Sowing of the 2011 main cereal crops has begun. After the weakening of the La Niña phenomenon, from February to April, a return to normal conditions is forecast for the next few months. The rainy season began as normal in mid-May, but rainfall has been irregular and below average, leading to losses of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

Significant reduction in cereal production in 2010

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

Prices of basic foods at record levels

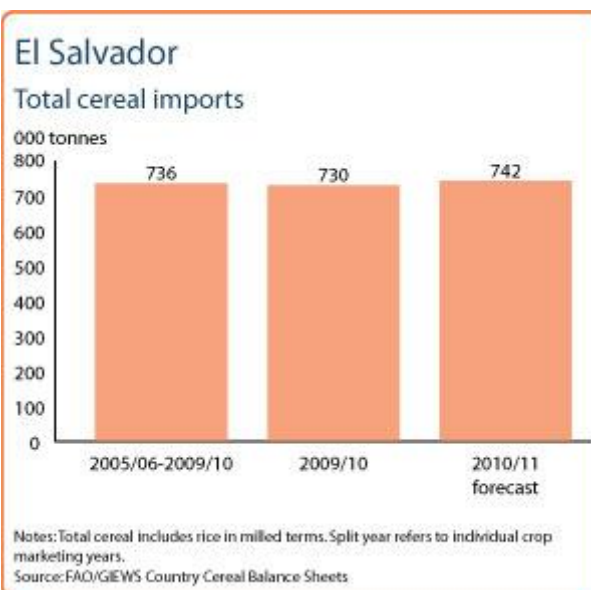
In March 2011, prices of maize and beans, the country's basic foods, reached record levels and were 40 percent higher than in March 2010. The increase in the price of maize is due to the reduced 2010 harvest and the high prices on the international market. In addition, prices of beans in March were 133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



El Salvador Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Maize	815	795	767	-4
Sorghum	171	166	108	-35
Rice (paddy)	30	36	31	-14
Others	0	0	0	0
Total	1016	997	906	-9

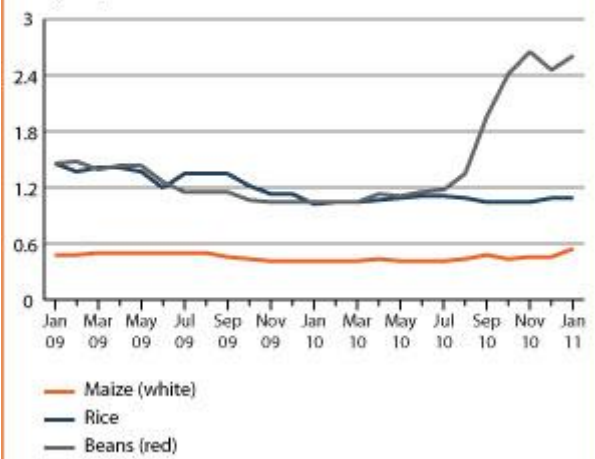
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



El Salvador

Selected retail food prices in San Salvador

USD per kg



Source: Dirección General de Economía Agropecuaria

Reference Date: 5-March-2011

FOOD SECURITY SNAPSHOT

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

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

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

Significant reduction in cereal production in 2010

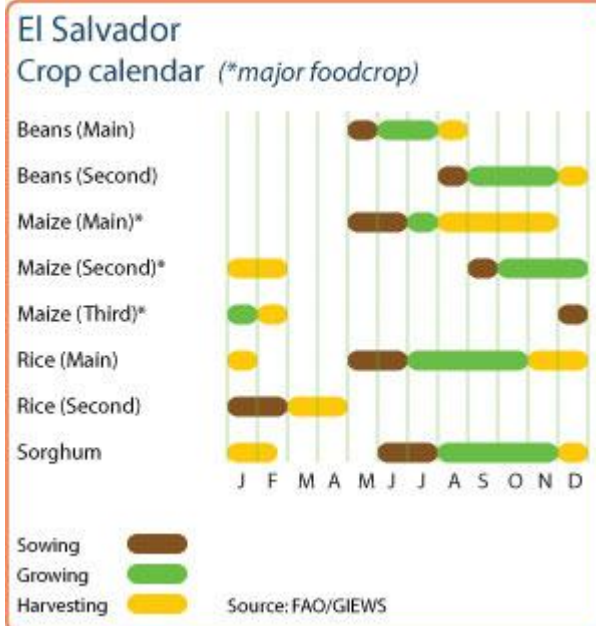
The country suffered the consequences of the tropical storms Matthew and Agatha during the first and second agricultural seasons. The Ministry of Agriculture reported losses of USD 96.3 million in the agricultural and livestock farming sectors, USD 69 million of which was due to the loss of basic grains.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

Increased import of basic grains compared to 2009

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

Sharp increase in the price of red beans

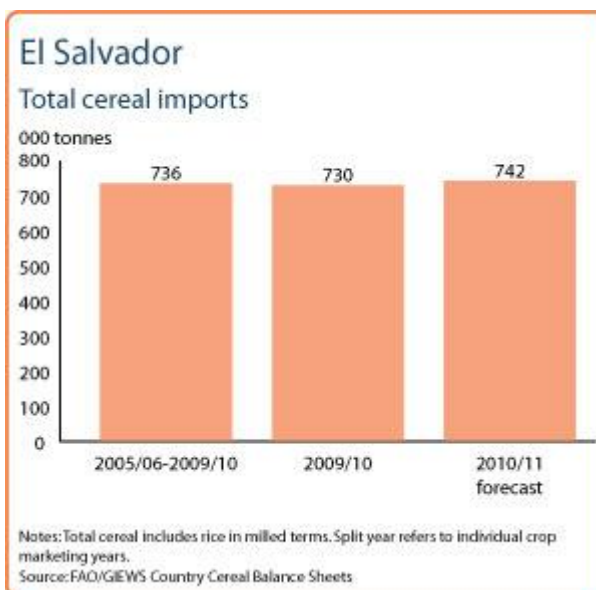
A 150 percent increase in the price of red beans compared to its price in 2010 was recorded in the San Salvador local market. This sharp increase is due to the low production of this crop across Central America, and particularly in Nicaragua, which supplies the bulk of the country's bean imports. The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



El Salvador Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes		percent	
Maize	815	795	767	-4
Sorghum	171	166	108	-35
Rice (paddy)	30	36	31	-14
Others	0	0	0	0
Total	1016	997	906	-9

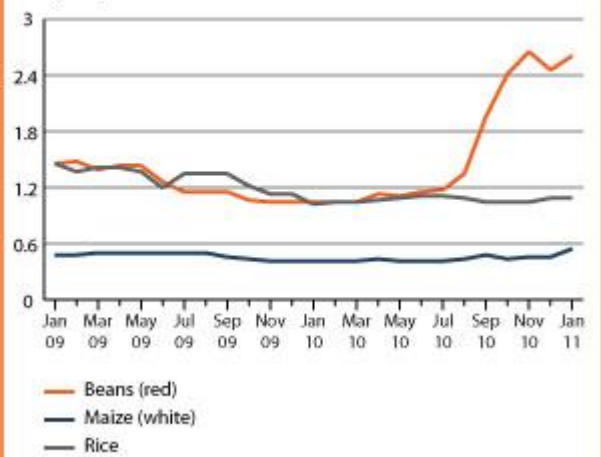
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



El Salvador

Selected retail food prices in San Salvador

USD per kg



Source: Dirección General de Economía Agropecuaria

Reference Date: 1-December-2010

FOOD SECURITY SNAPSHOT

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

Coastal and Central valley regions have been affected by excessive rainfall

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

Good cereal harvest in 2010

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

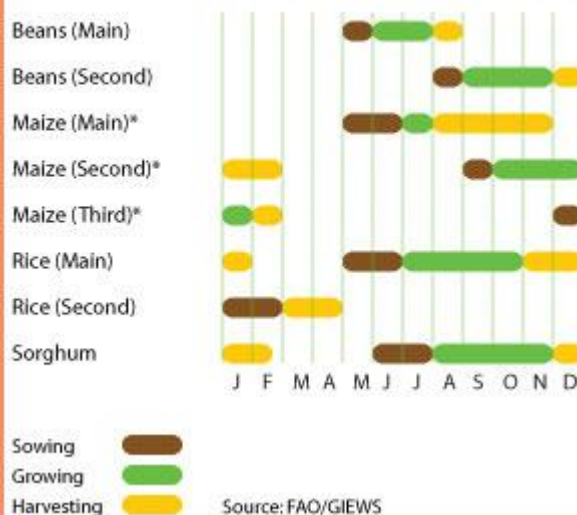
Imports of basic grains in 2010 are forecast to increase compared to the previous year

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

Sharp increase of red beans price

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

El Salvador Crop calendar (*major foodcrop)

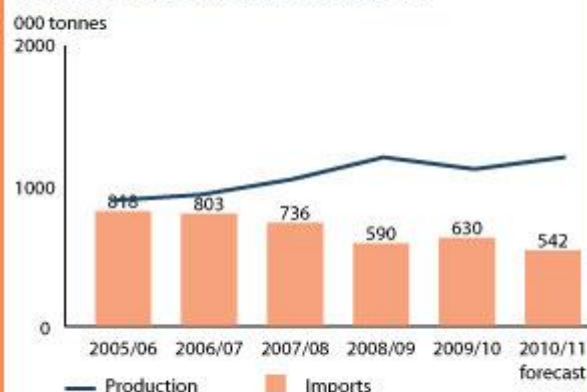


El Salvador Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes		percent	
Maize	836	900	990	10
Sorghum	174	184	184	0
Rice (paddy)	30	36	31	-14
Others	0	0	0	0
Total	1041	1120	1205	8

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

El Salvador Total cereal production and imports

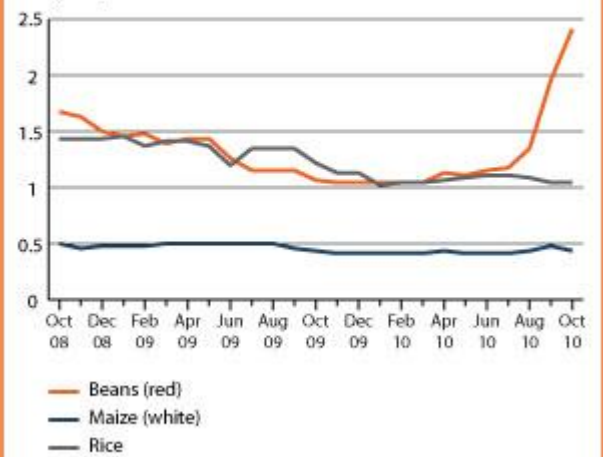


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

El Salvador

Selected retail cereal prices in San Salvador

USD per kg



Source: Dirección General de Economía Agropecuaria

Reference Date: 1-October-2010

FOOD SECURITY SNAPSHOT

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

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

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

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

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

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

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

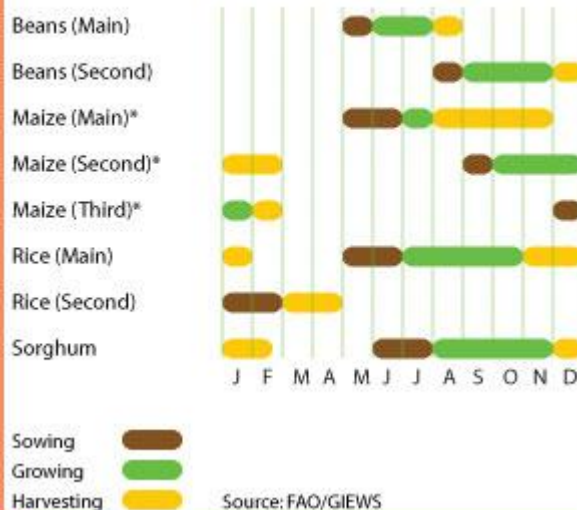
In 2010 imports of basic grains are forecast to increase on last year

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

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

Following a stable trend that lasted since November 2009, where red beans quotations on the market of San Salvador were similar to pre-food crisis level, prices have started to increase again since April. In particular red beans price rose by 15 percent between June and August

El Salvador Crop calendar (*major foodcrop)



El Salvador

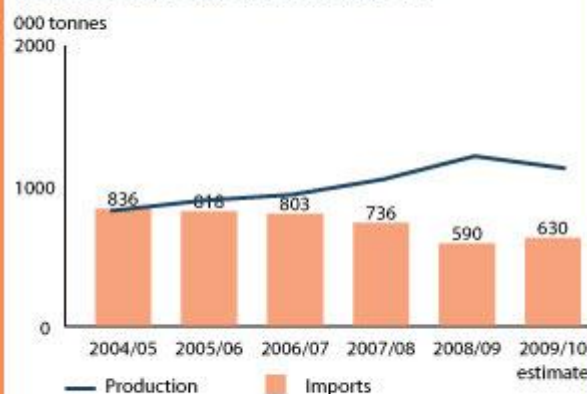
Cereal production

	2005-2009	2010		change
	average	2009	forecast	2010/2009
	000 tonnes			percent
Maize	836	900	990	10
Sorghum	174	184	184	0
Rice (paddy)	30	36	31	-14
Others	0	0	0	0
Total	1041	1120	1205	8

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

El Salvador

Total cereal production and imports



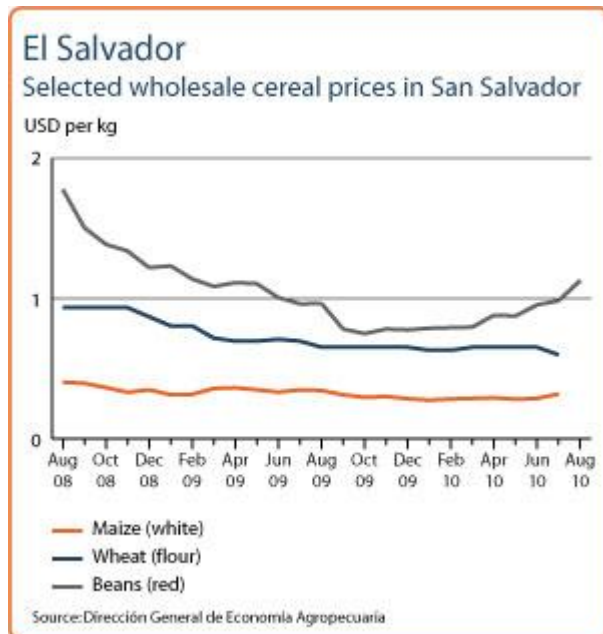
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

alone. This sudden increase prompted the government to meet with the representatives of the private sector to plan a strategy of price control in the following months. However, according to the Ministry of Agriculture, the limited deficit of red beans on the local market does not justify the skyrocketing price and calls traders not to hoard the commodity.

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

A significant growth in foreign remittances has been recorded in 2010

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



Reference Date: 12-April-2010

FOOD SECURITY SNAPSHOT

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

Heavy rains are expected at the end of April

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

Planting of 2010 main cropping season is about to start

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

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

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

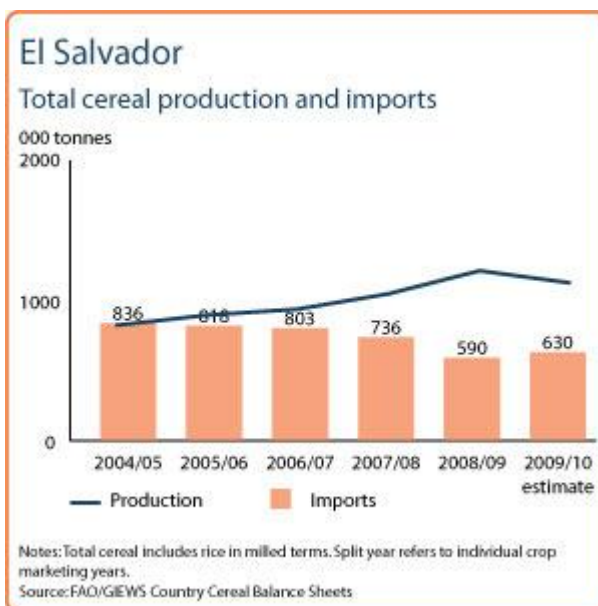
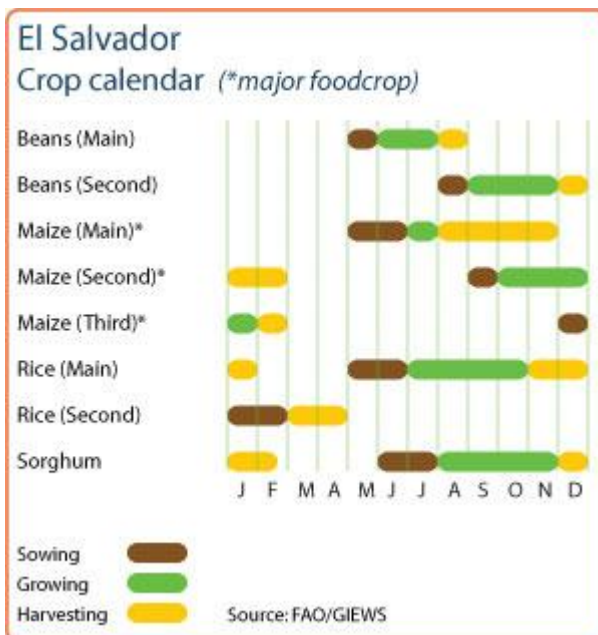
In marketing year 2009/10 imports of basic grains are forecast to increase

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

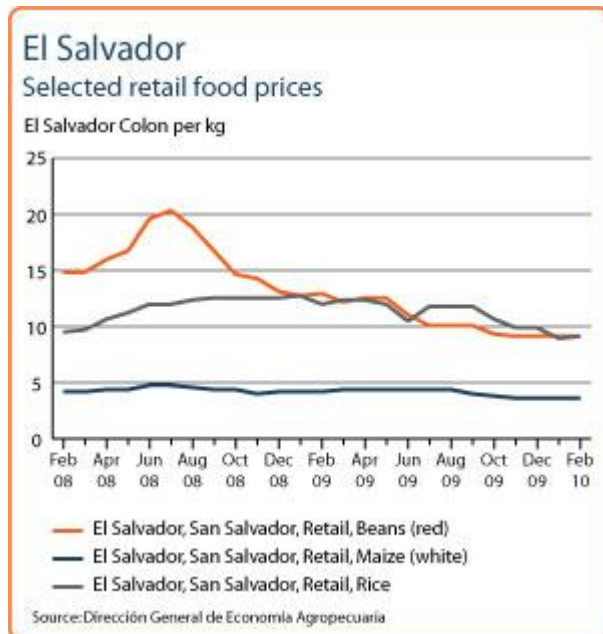
Beans prices are declining sharply from mid-2008. Maize and rice quotations are back to the level of two years ago

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

Quotations of white maize continued to remain stable in line with the



trend of prices in international markets.



Reference Date: 10-September-2009

FOOD SECURITY SNAPSHOT

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

The drought may depress maize output

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

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

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

Rice: no damage reported

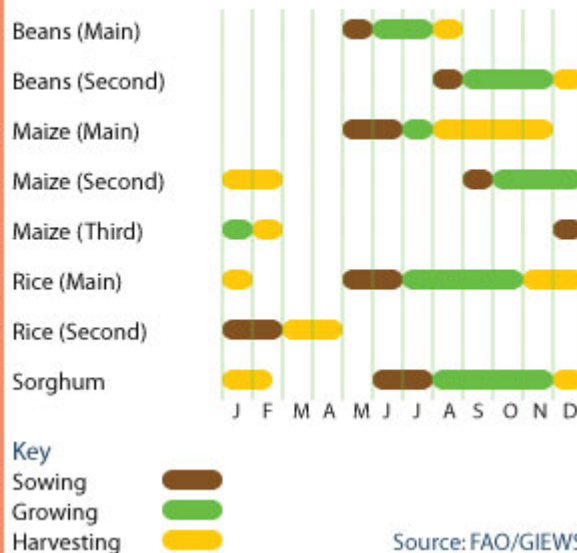
According to the MAG, the rice harvest is guaranteed because it is sown in the Irrigation Districts, mainly in Atiocoyo Norte and Atiocoyo Sur both of which are in the north of the Department of La Libertad and the west of the Department of Chalatenango.

Fresh investment in bean farming

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

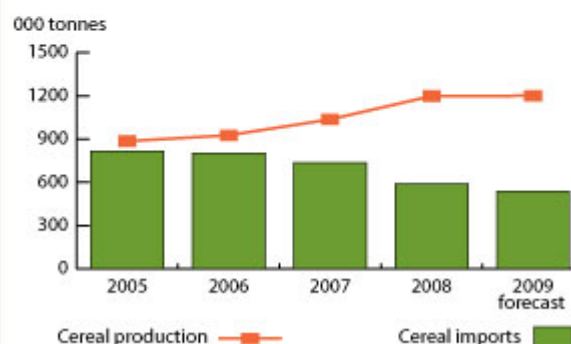
This will make it possible to expand the areas sown and raise bean production to 140 000 tonnes for the current agricultural cycle.

Crop calendar El Salvador



Cereal production and imports El Salvador

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes		percent	
Maize	786	975	990	1.5%
Sorghum	167	201	184	-8.5%
Rice (milled)	20	23	27	17.4%
Total Cereals	972	1199	1201	0.2%



Source: FAO/GIEWS Country Cereal Balance Sheets

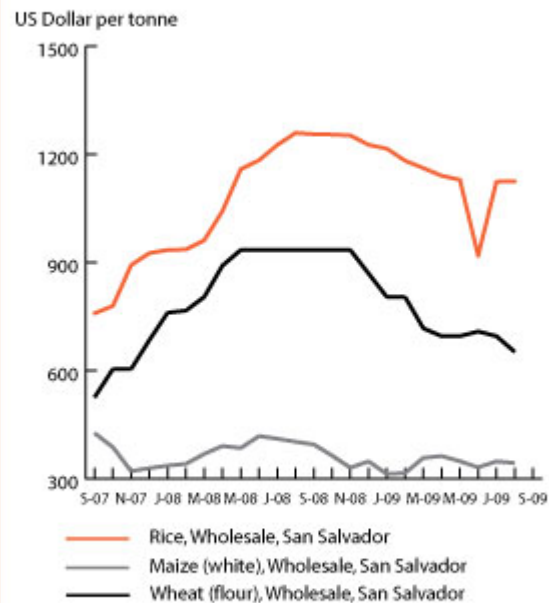
No concern about staple food prices

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

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

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

El Salvador Selected food prices



Source: Dirección General de Economía Agropecuaria