



GIEWS Country Brief The Plurinational State of Bolivia

Reference Date: 26-May-2023

FOOD SECURITY SNAPSHOT

- Maize production in 2023 expected at below-average level
- Imports of cereals in 2022/23 anticipated at low levels
- Despite recent declines, prices of wheat flour remained well above year-earlier levels

Maize production in 2023 expected at below-average level

Harvesting of the 2023 main maize crop, which accounts for about 75 percent of the annual production, is ongoing. Production is anticipated to be below the average, as moisture deficits at the start of the season caused a reduction in sowings. Adverse weather conditions also affected crop yields. Excessive rainfall amounts and some cold snaps affected crops at flowering and grain-filling stages. In addition, the lack of diesel hampered harvesting operations in the key cereal producing department of Santa Cruz.

Aggregate maize production in 2023, including the dryness-affected minor season crops harvested during the third quarter of 2022, is expected to remain at below-average levels for the second consecutive year.

Planting operations of the 2023 main wheat crop are underway. Lack of diesel, together with saturated soils due to recent heavy rains, are expected to reduce the extent of sowings. Weather forecasts indicate above-average precipitation amounts between June and August, which could exacerbate the saturation of soils and constrain yield potential.

Imports of cereals in 2022/23 anticipated at low levels

Cereal imports in the 2022/23 marketing year (July/June), mostly wheat, are anticipated at a below-average level of 270 000 tonnes. The low level mainly reflects carryover stocks from the above-average production of wheat harvested in 2021/22, together with a shift in consumption to locally produced cereals, amid high international prices of wheat.

Bolivia (Plurinational State of)

Crop Calendar

(*major foodcrop)



Bolivia (Plurinational State of)

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Maize	1 078	960	965	0.5
Sorghum	1 018	615	950	54.4
Rice (paddy)	519	417	480	15.2
Others	381	318	378	18.9
Total	2 995	2 310	2 773	20.0

Note: Percentage change calculated from unrounded data.

Despite recent declines, prices of wheat flour remained well above year-earlier levels

Wholesale prices of yellow maize declined seasonally in April 2023 with the ongoing main harvest and were higher year-on-year, due to tight supplies from the below-average harvest in 2022. Prices of rice also decreased in recent months as the 2023 harvest increased market supplies. By contrast, prices of wheat flour have declined since December 2022, following the recent downward pressure in international markets. However, prices in April remained nearly 20 percent above their year-earlier levels, after the sharp increases that occurred by end-2022.

In April 2023, food prices were generally higher year-on-year, with the annual food inflation rate estimated at 5.6 percent. The price increases were partially controlled through subsidies on fuel and bread prices. Prices of gasoline and diesel have been fixed at BOB 3.7/litre (equivalent to USD 0.5/litre) since 2010. Prices of a loaf of bread (*pan de batalla*) [have been also pegged at BOB 0.5](#) since 2016. Considering the higher year-on-year domestic prices of wheat flour and the elevated international oil quotations, the subsidy system could be very costly, widening the country's fiscal deficit.

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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/>

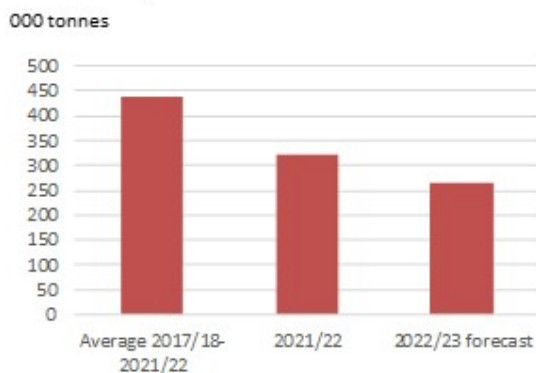
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>

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

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

Bolivia (Plurinational State of)

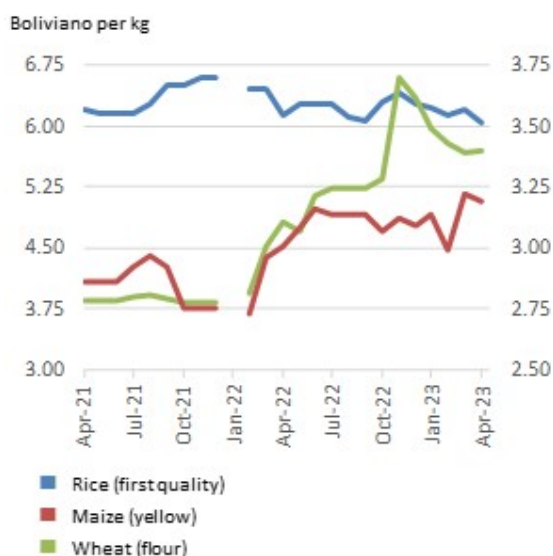
Cereals Imports



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

Bolivia (Plurinational State of)

Wholesale prices in La Paz





GIEWS Country Brief

Bolivia (Plurinational State of)

Reference Date: 23-May-2022

FOOD SECURITY SNAPSHOT

- Production of 2022 maize and sorghum crops expected at below-average level
- Import requirements of cereals in 2021/22 anticipated at low levels
- Prices of wheat flour soared in March 2022 and reached 20 percent above their levels one year earlier

Production of 2022 maize and sorghum crops expected at below-average level

Harvesting of the 2022 main maize crop, which accounts for about 75 percent of the annual production, is ongoing. Production is anticipated to be below the average, mainly reflecting a low level of the area sown. The high planting intentions, triggered by the below-average output obtained in the precedent minor season, did not materialize as heavy rains in December 2021 caused flooding and affected planting operations. In addition, yields are estimated at low levels as precipitation amounts between January and March 2022 have been generally below the long-term average.

The 2022 aggregate maize production, including the dryness-affected minor season crops harvested during the third quarter of 2021, is expected to be below the average and significantly less than the 2021 bumper production.

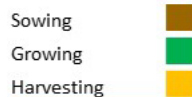
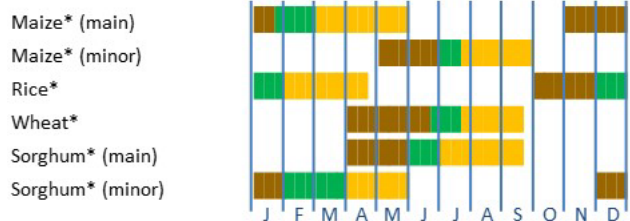
The harvest of the 2022 minor sorghum crop is nearing completion in the key producing Santa Cruz Department. Production is estimated to be below the average reflecting dry weather conditions during the first quarter of 2022. The main season output was also at a below-average level as cold snaps and prolonged dry spells severely affected crops at grain-filling stages.

Planting operations of the 2022 main wheat are underway. The area sown is officially forecast at an above-average level, reflecting higher year-on-year market prices of wheat and

Bolivia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Bolivia

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	1 038	955	1 225	28.3
Sorghum	870	1 019	1 481	45.4
Rice (paddy)	503	487	480	-1.5
Others	366	436	429	-1.6
Total	2 777	2 897	3 615	24.8

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

incentive measures put in place by the government. These measures include the provision of loans at a 0.5 percent interest rate to wheat farmers via the SIBOLIVIA programme and an increase in wheat procurement prices (from USD 335/tonne in 2021 to USD 390/tonne in 2022). The Food Production Support Company (EMAPA) will also increase the volume of purchases from 130 000 tonnes in 2021 to 211 000 tonnes in 2022. Weather forecasts indicate below-average precipitation amounts during the May to July period, with potentially adverse effects on yields.

Imports of cereals in 2021/22 anticipated at low levels

Cereal import requirements in the 2021/22 marketing year (July/June), mostly wheat, are anticipated at a below-average level of 580 000 tonnes. The low level of requirements reflects abundant supplies from the above-average harvests and imports in 2019/20 and 2020/21. Imports of wheat between July 2021 and February 2022 were more than 30 percent lower compared to the same period of the previous five years. High export wheat prices of Argentina, the country's main supplier, also contributed to a decline in imports.

Prices of wheat flour soared in March and reached 20 percent above its levels one year earlier

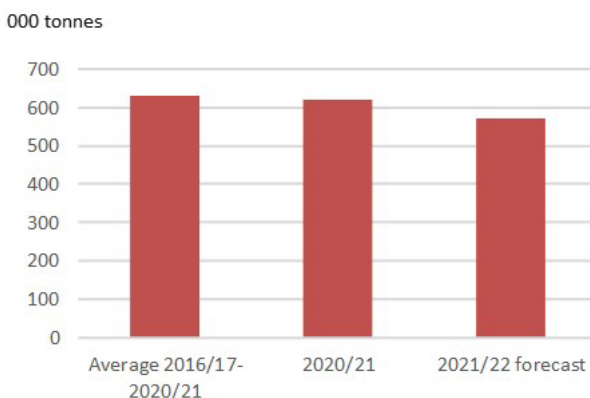
After being stable throughout 2021, average wholesale prices of wheat flour in La Paz markets rose by 20 percent on a monthly basis in March 2022 due to the upsurge in international quotations. While prices of rice remained steady since September 2021, prices of yellow maize increased in March 2022 reflecting low market supplies. Amid increasing prices, the EMAPA announced to release [100 000 tonnes of yellow maize](#) for the feed industry. In March, prices of rice and yellow maize were about 5 percent above their year-earlier levels.

Impacts of global energy and food price shocks on domestic food security

High international prices of natural gas and vegetable oil are expected to boost the export earnings of the country, as gas and soybean meal/oil are the major exportable commodities in value terms. Despite the high international energy and food prices, the country did not experience an upsurge in inflation, with the annual inflation rate kept at about 1 percent in April 2022. The overall stable prices could be attributed to the fixed exchange rate system (currently BOB 6.91/USD 1) and subsidized fuel and bread prices. Prices of gasoline and diesel are fixed at BOB 3.7/litre (equivalent to USD 0.5/litre) since 2010. Prices of a loaf of bread (*pan de batalla*) have been also pegged at BOB 0.5 since 2016. However, prices of wheat flour rose sharply in March 2022 following upward trends in the international markets, as the country depends on imports of wheat grain and flour to cover about 60 percent of its domestic consumption requirements. In April 2022, the government implemented a series of policy measures to boost an expansion of area sown to the main wheat crop (production paragraph above). After the

Bolivia

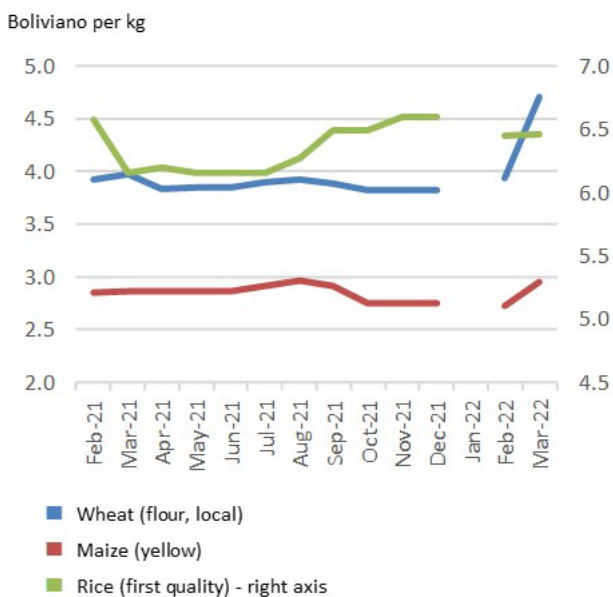
Cereals Imports



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.

Bolivia

Wholesale prices in La Paz



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

domestic production of fertilizers (urea and potassium chloride) started in 2018, the country has been a net exporter of fertilizers during the 2019 to 2021 period. Although the high international energy and food prices are likely to have a limited impact on food production and livelihoods of households, they could widen the country's fiscal deficit, given the heavy subsidies implemented on fuel and bread.

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GIEWS Country Brief

Bolivia (Plurinational State of)

Reference Date: 06-July-2021

FOOD SECURITY SNAPSHOT

- Planted area of 2021 sorghum crop estimated at above-average level
- Imports of cereals in 2021/22 forecast at high levels
- Prices of yellow maize and rice declined seasonally in March-May period
- Concerns on food security situation amid third COVID-19 pandemic wave

Planted area of 2021 sorghum crop estimated at above-average level

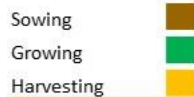
Planting of the 2021 sorghum, main season wheat and minor season maize crops has recently completed. The planted area to sorghum is estimated at an above-average level, as farmers have gradually shifted from maize to sorghum, which is more resistant to drier conditions compared to maize. By contrast, below-average maize sowings are estimated due to low profit margins, exacerbated by dry conditions in the main maize producing department of Santa Cruz in May. Plantings of wheat are estimated at above-average levels, supported by favourable prospects for profits and the distribution of agricultural inputs and seeds by government programmes. Weather forecasts indicate a high likelihood of below-average precipitation amounts during the July-September period in the key cereal producing eastern region, with potential negative consequences on crop yields.

Harvesting of the 2021 rice and main season maize crops was completed in May. Crop yields are reported to be generally good as abundant rain amounts in December and January replenished soil moisture and favoured crops at germination and flowering stages. This is despite the localized crop losses, caused by torrential rains in late February in the main producing Beni and Santa Cruz departments. As a result, the 2021 paddy output is estimated at an above-average level of 540 000 tonnes. Despite good yields, a below-average production of the main season maize crop is estimated, resting on the contraction of the area sown.

Bolivia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Bolivia

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	1 038	955	950	-0.5
Sorghum	870	1 019	1 050	3.1
Rice (paddy)	517	560	540	-3.6
Others	360	410	402	-1.8
Total	2 786	2 943	2 942	0.0

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

Imports of cereals in 2021/22 forecast at high levels

Cereal import requirements in the 2021/22 marketing year (July/June) are forecast at an above-average level of 670 000 tonnes. Imports of wheat, which account for about 90 percent of the total annual imports, are anticipated to be about 15 percent above the five-year average. The high level of import needs reflects the strong demand for food consumption as well as the suspension of tariffs on wheat imports for a period of two years starting from April 2020 which made imported grains more competitive on the domestic markets.

Prices of yellow maize and rice declined seasonally in March-May period

Wholesale prices of yellow maize and rice declined between March and May due to increased market supplies from the commercialization of the 2021 harvests. Prices of wheat flour, mostly imported, also generally weakened in the March-May period, reflecting adequate imports.

Concerns on food security situation amid third COVID-19 pandemic wave

After a contraction by 8 percent in 2020 associated with the COVID-19 pandemic, the Gross domestic product (GDP) is forecast to grow by 5.5 percent in 2021. Amid a third wave of the pandemic since May 2021 that brought a reintroduction of containment measures, concerns remain on the food security situation of the most vulnerable households due to their high dependency of informal wages.

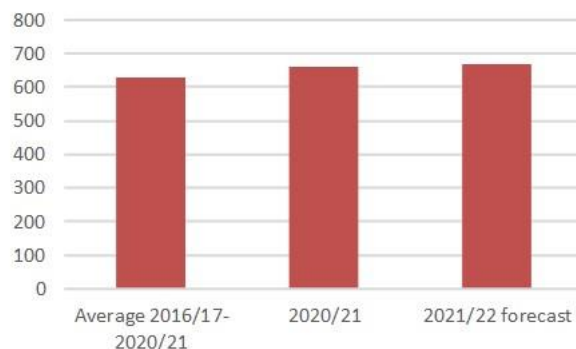
In order to support households' access to food, the government delivered a one-off grant of BOB 1 000 (approximately USD 145) to about 4 million people between December 2020 and May 2021.

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Bolivia

Cereals Imports

000 tonnes



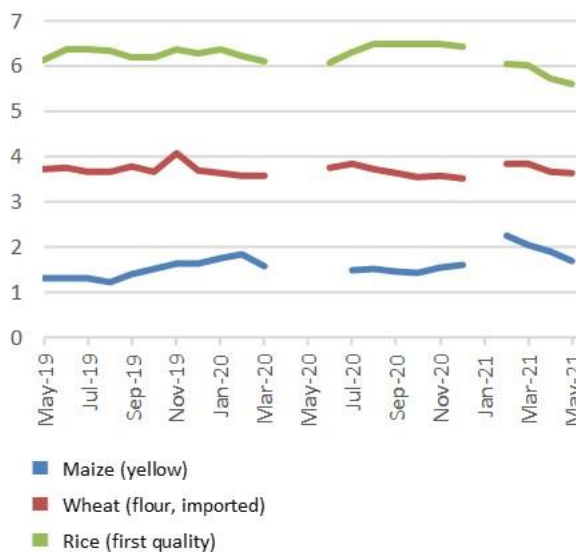
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Bolivia

Wholesale prices in Santa Cruz

Boliviano per kg



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



GIEWS Country Brief

Bolivia (Plurinational State of)

Reference Date: 01-February-2021

FOOD SECURITY SNAPSHOT

- Dry weather conditions raise concerns on yield prospects for 2021 winter crops
- Cereal production in 2020 estimated at near-record level
- Import requirements of cereals in 2020/21 forecast at high levels
- Retail prices of cereals near year-earlier values reflecting adequate supplies
- Concerns on food security situation of most vulnerable households amid economic downturn

Dry weather conditions raise concerns on yield prospects for 2021 winter crops

The 2021 winter season maize, wheat and rice crops are currently at flowering to grain filling stages. Rainfall deficits between October and December 2020 caused delays to planting operations and affected the early development of crops. As at the first dekad of January (see VCI map), vegetation conditions in the main producing western areas of Santa Cruz Department were significantly stressed. The weather forecast for the February-April 2021 period indicates a high likelihood of below-average rainfall, lowering yield expectations.

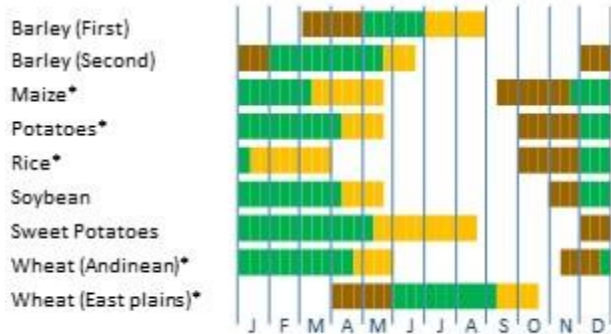
Cereal production in 2020 estimated at near-record level

Aggregate cereal production in 2020 is estimated at a near-record level of 3 million tonnes, slightly higher than the previous year's already high level. The bumper output is mainly the result of above-average yields of winter maize, sorghum and wheat crops, reflecting favourable weather conditions. Production of rice is estimated to be 10 percent above the previous five-year average due to high yields, supported by adequate rainfall amounts in the main producing departments of Santa Cruz and Beni, which more than offset a slight contraction in the planted area.

Bolivia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Bolivia

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	1 059	987	1 010	2.3
Sorghum	838	949	1 002	5.6
Rice (paddy)	511	600	560	-6.7
Others	365	408	410	0.5
Total	2 772	2 944	2 981	1.3

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

Import requirements of cereals in 2020/21 forecast at high levels

Cereal import requirements in the 2020/21 marketing year (July/June) are forecast at 670 000 tonnes, nearly 15 percent above the five-year average. Imports of wheat, which account for about 90 percent of the total annual imports, are estimated at 600 000 tonnes, about 20 percent above the five-year average. The high level of imports reflects the strong domestic demand as well as the suspension of tariffs on wheat imports for a period of two years starting from April 2020.

Retail prices of cereals near year-earlier values reflecting adequate supplies

Prices of rice were near their year-earlier values in most markets due to the above-average harvest in 2020. However, prices of rice increased significantly in the key producing department of Santa Cruz in the October-December period, mainly reflecting concerns over the impact of dryness on the 2021 paddy crop.

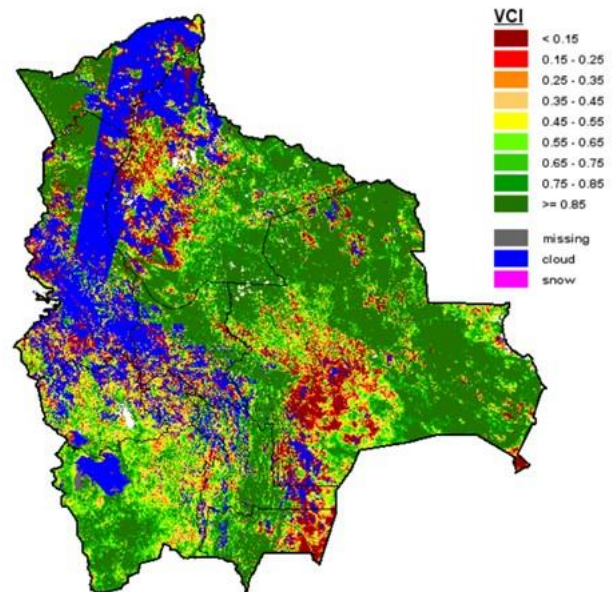
Prices of wheat flour generally decreased seasonally during the last quarter of 2020. The increased supplies from the larger imports in the September-November period also contributed to the decline.

Concerns on food security situation of most vulnerable households amid economic downturn

According to the Economic Commission for Latin America and the Caribbean (ECLAC) of the United Nations, the Gross Domestic Product growth is expected to contract by 8 percent in 2020 due to the negative effects of the COVID-19 pandemic. The economic downturn could result in a deterioration of the food security situation of the most vulnerable households, which are highly dependent on daily wages in the informal sector. In 2020, the Government delivered cash transfers and food aid to 13 million people through new programmes such as *Canasta Familiar*, *Bono Familia* and *Bono Universal*, which complemented the existing social protection policy. A new cash transfer programme, *Bono contra el Hambre*, will deliver a one-off grant of BOB 1 000 (approximately USD 145) per beneficiary during the first quarter of 2021.

Bolivia - Vegetation Condition Index (VCI)

Dekad 1, January 2021

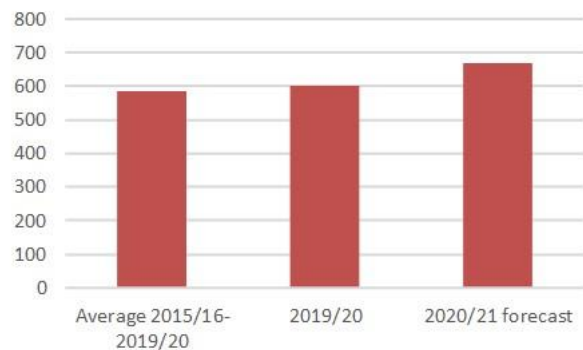


Source: FAO/GIEWS Earth Observation System.

Bolivia

Cereals Imports

000 tonnes

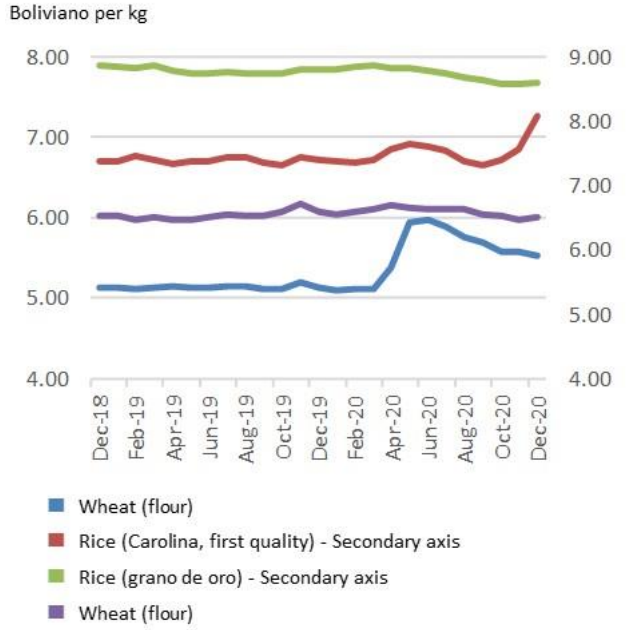


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Bolivia

Retail prices in selected markets



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



GIEWS Country Brief

Bolivia (Plurinational State of)

Reference Date: 10-August-2020

FOOD SECURITY SNAPSHOT

- Aggregate cereal production in 2020 preliminarily forecast at above-average level
- Import requirements of cereals in 2020/21 forecast slightly above-average levels
- Retail prices of cereals higher year on year due to upsurge in domestic demand

Aggregate cereal production in 2020 preliminarily forecast at above-average level

The harvest of the 2020 paddy crop finalized in May and production is estimated at 560 000 tonnes, nearly 10 percent above the previous five-year average, mainly reflecting above-average yields. Favourable weather conditions from November 2019 to February 2020 during the cropping season boosted yields of the mostly rainfed paddy crops in the main producing departments of Santa Cruz and Beni.

Harvesting of the 2020 main season maize crop is virtually complete and the planted area is estimated to have contracted, reflecting farmers' shift to the more remunerative soybean crop. Reduced rainfall amounts during the grain filling stage in the March-April period constrained crop yields in the main producing department of Santa Cruz.

Planting operations of the 2020 winter crops (wheat, minor maize and main sorghum) have been recently completed. Abundant and well-distributed rains in May and June were conducive for planting and early development of the crops. Weather forecasts for the August-October period indicate a higher likelihood of average rainfall, pointing to favourable production prospects.

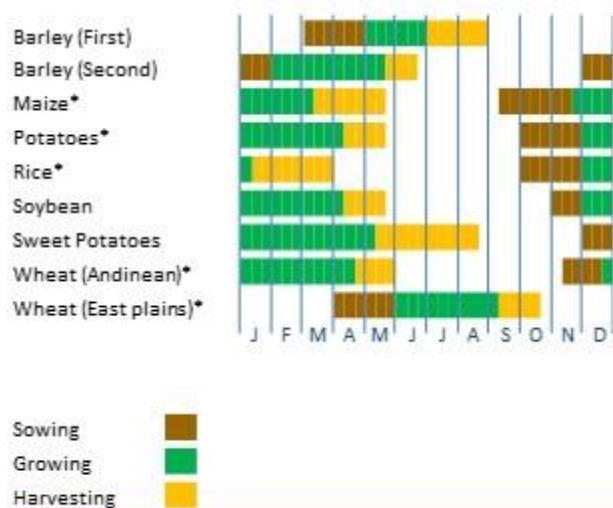
The aggregate cereal production in 2020 is preliminarily forecast at 3 million tonnes, about 8 percent above the previous five-year average.

On June 2020, the Ministry of Land and Rural Development launched an agricultural sector rehabilitation plan worth USD 874 million, with the financial and technical support of international organizations, including FAO. The plan seeks to boost the production of crops for domestic consumption as well

Bolivia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Bolivia

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	1 059	987	1 060	7.4
Sorghum	838	949	960	1.2
Rice (paddy)	511	600	560	-6.7
Others	356	366	388	6.0
Total	2 764	2 902	2 968	2.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

as for exports and compensate the negative effects of the COVID-19 pandemic on the food supply chain.

Import requirements of cereals in 2020/21 forecast slightly above-average levels

Cereal import requirements are forecast at slightly above-average levels of 610 000 tonnes in the 2020/21 marketing year (July/June). The anticipated above-average imports of wheat, which account for more than 90 percent of the total annual imports, reflect the high domestic demand for food use.

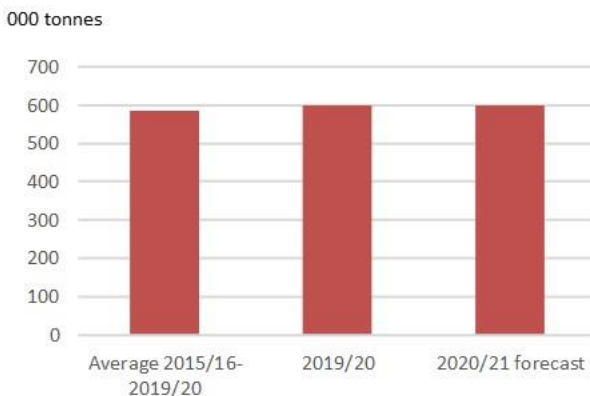
Retail prices of cereals higher year on year due to upsurge in domestic demand

Prior to the enforcement of the COVID-19 containment measures in March 2020, retail prices of rice and imported wheat flour were generally stable. However, in April and May, retail prices of both food commodities increased significantly, driven by an upsurge in domestic demand. Reflecting improved supplies from the summer crop harvests and subdued demand, retail prices of both food products levelled off in June, but were higher than their year-earlier levels.

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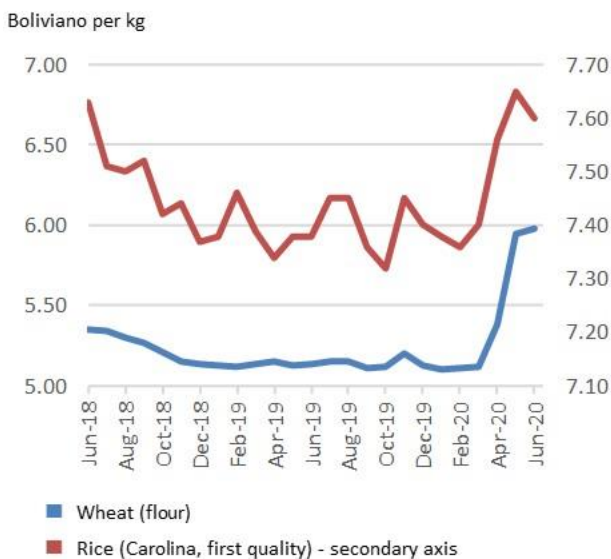
Cereals Imports



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.

Bolivia

Retail prices in Santa Cruz



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



GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 08-April-2020

FOOD SECURITY SNAPSHOT

- Production prospects for 2020 summer cereal crops overall favourable
- Cereal production in 2019 estimated slightly above five-year average
- Import requirements of cereals in 2019/20 forecast at below-average level
- Prices of yellow maize higher year on year due to reduced harvests in 2019

Production prospects for 2020 summer cereal crops overall favourable

Harvesting operations of the 2020 rice crop are underway and production is anticipated at a slightly above-average level due to average plantings and good rainfall amounts during the crop development stage.

The summer season maize (main) and sorghum (minor) crops are at the maturation stage, under generally favourable conditions. According to the estimates of the main association of farmers (ANAPO in its Spanish acronym), the planted area of the main season maize crop declined for the third consecutive year. The decline mainly reflects farmers' shift to the more remunerative soybean crop that is planted at the same time of maize. The output of the 2020 summer maize crop, to be harvested from April, is preliminarily projected at near-average levels as the contraction in the sown area is expected to be offset by average to above-average yields.

Planting of the 2020 winter crops (wheat, minor maize and main sorghum) is expected to take place between mid-April and June. Weather forecasts for this period point to a higher likelihood of average to above-average precipitations in most parts of the key producing departments Santa Cruz and Beni, which are expected to support planting operations.

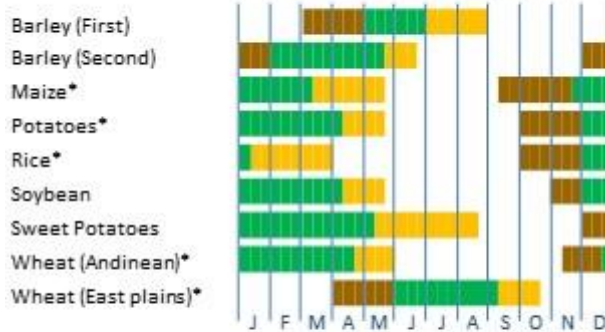
Cereal production in 2019 estimated slightly above five-year average

While the 2019 maize output is estimated at a near-average level, production of other cereal crops (sorghum, rice and wheat)

Bolivia

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Bolivia

Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
Maize	1 063	1 261	987	-21.7
Sorghum	779	1 023	949	-7.3
Rice (paddy)	488	541	562	3.9
Others	371	335	387	15.5
Total	2 700	3 161	2 885	-8.7

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

in 2019 was above average, reflecting an expansion in plantings. As a result, the aggregate 2019 cereal production is estimated at 2.9 million tonnes, slightly above the five-year average, but about 9 percent below the previous year's bumper level.

Import requirements of cereals in 2019/20 forecast at below-average level

Cereal import requirements in the 2019/20 marketing year (July/June), mostly wheat, are forecast at a below-average level of 518 000 tonnes. The low level of anticipated imports is due to the carryover stocks built after the surge of wheat imports in 2016 and the slightly above-average production of wheat obtained in 2019.

Prices of yellow maize higher year on year due to reduced harvests in 2019

Prices of yellow maize reached record high levels in last December and January as the seasonality was exacerbated by the year-on-year decline in 2019 harvests. Despite a significant decline in February 2020, the average price of maize was still about 20 percent higher than its year-earlier values.

Prices of locally produced rice have been generally stable in most markets since December 2019. Prices of wheat flour, mostly imported from Argentina, were generally stable in early 2020 and, in February 2020, they were below their year-earlier values due to adequate import flows.

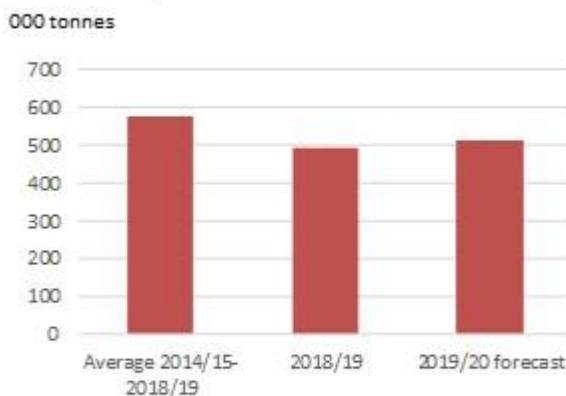
COVID-19 and measures adopted by the Government

Amidst the nationwide confinement put in place from 26 March to 15 April 2020, transportation of food and agricultural inputs, sales of food items and [agricultural activities](#) are allowed to operate normally. The State Enterprise for Support to Food Production (EMAPA by its Spanish acronym) [assured the supply of staple ingredients](#) (i.e. wheat flour to the bread industry). In order to guarantee access to food of the most vulnerable population, the Ministry of Agriculture and Rural Development [plans to distribute](#) BOB 400 in cash (about USD 60 at the exchange rate of 1 April 2020) and some municipalities are also distributing basic food items.

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Bolivia

Cereals Imports

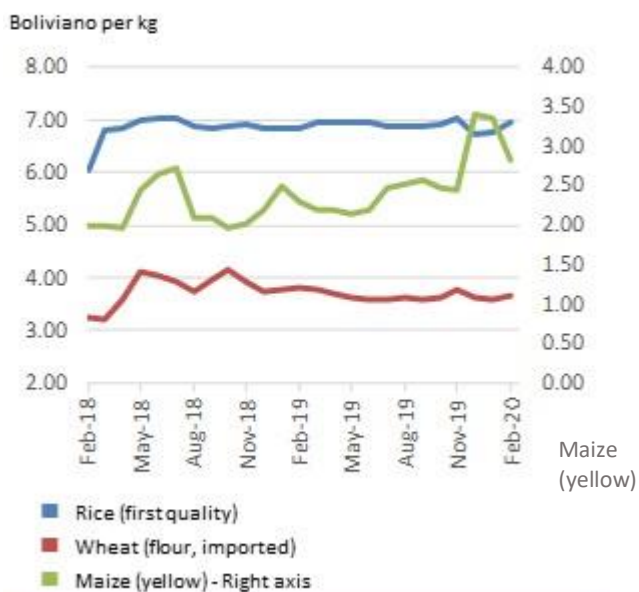


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Bolivia

Wholesale prices in La Paz



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



GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 07-November-2019

FOOD SECURITY SNAPSHOT

- Cereal production in 2019 estimated near average, despite sharp drop year on year
- Planting of 2020 summer cereal crops ongoing amid soil moisture deficits
- Import requirements of cereals in 2019/20 forecast at average level
- Prices of yellow maize higher year on year due to yearly reduction in maize outputs

Cereal production in 2019 estimated near average, despite sharp drop year on year

The aggregate 2019 cereal production is estimated at a near-average level of 2.8 million tonnes. The production is expected to have decreased by 11 percent, year on year, from the bumper level of the previous year, when yields benefitted from good weather conditions.

The harvest of the 2019 winter crops, mainly maize, sorghum and wheat, is nearing completion and outputs are expected to have declined year on year and remain near average. The decline reflects the reduced yields, mainly of maize and sorghum, due to dry weather conditions during the critical crop establishment stages. Plantings of wheat increased due to the higher producer prices set by the Government, but strong winds in August damaged standing crops and lowered yields.

Production of the 2019 summer crops, harvested in the second quarter of the year, is also estimated to have declined due to a contraction in plantings of the maize crops due to low prices and moisture deficits during the planting period.

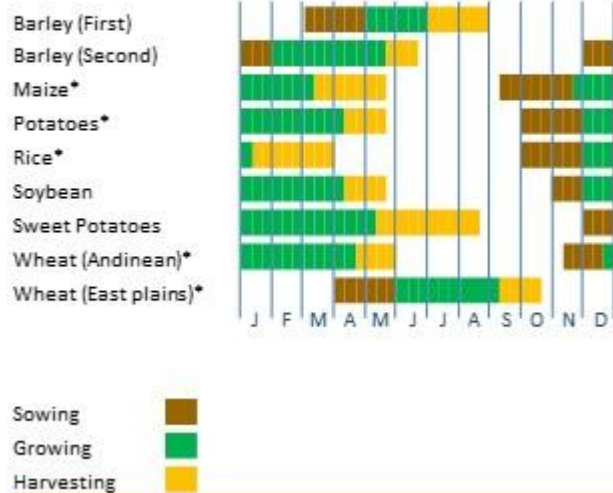
Planting of 2020 summer cereal crops ongoing amid soil moisture deficits

Land preparation and planting operations of the 2020 summer crops, to be harvested from March next year, are underway. The key cereal producing departments of Santa Cruz and Beni are experiencing soil moisture deficits due to the below-average rainfall amounts since September. If dry conditions continue in the remaining of 2019, as forecast by the National Service of

Bolivia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Bolivia

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	1 063	1 261	1 050	-16.7
Sorghum	779	1 023	890	-13.0
Rice (paddy)	474	480	465	-3.1
Others	378	371	387	4.3
Total	2 694	3 135	2 792	-10.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Meteorology and Hydrology (SENAMHI), yields of summer crops are likely to be adversely affected.

Import requirements of cereals in 2019/20 forecast at average level

Cereal import requirements in the 2019/20 marketing year (July/June), mainly wheat, are forecast at a near-average level of 558 000 tonnes. The forecast reflects the sustained demand for wheat grain and flour for human consumption and the average cereal harvest in 2019.

Prices of yellow maize higher year on year due to yearly reduction in maize outputs

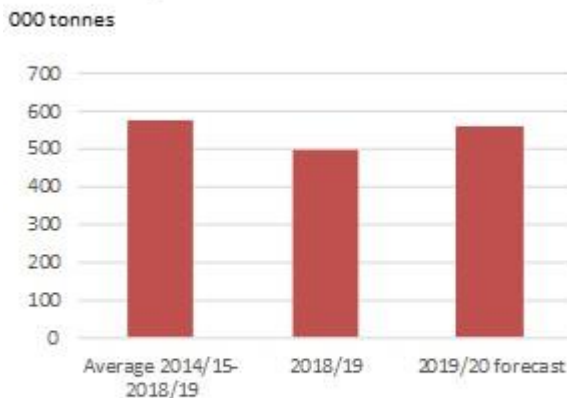
In 2019, prices of yellow maize declined seasonally between March and May and started to increase in June due to concerns over the impact of unfavourable weather conditions on maize output and, in September, they were well above year on year.

In the same month, prices of locally produced rice were similar to their values a year earlier, reflecting adequate supplies. Prices of wheat flour, mostly imported from Argentina, have been declining since the beginning of 2019 and, in September, were below their year-earlier values, owing to adequate imports.

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Bolivia

Cereals Imports

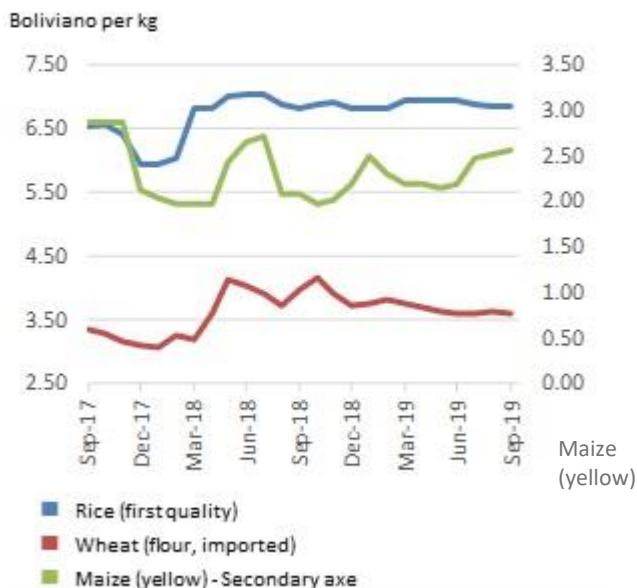


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Bolivia

Wholesale prices in La Paz



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



GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 03-June-2019

FOOD SECURITY SNAPSHOT

- Cereal production forecast at near-average level in 2019
- Cereal imports in 2018/19 marketing year expected to decline to below average levels
- Maize prices declined in April in line with seasonal trends

Cereal production forecast at near-average level in 2019

The harvesting of rice and summer maize crops was completed in mid-May, with exceptions of the southern *Chaco* Region, where harvesting operations of maize continue until end-June. The summer maize output, which accounts to slightly more than half of the total production, is anticipated to decline due to reduced plantings instigated by the lower prices of maize as well as dry weather conditions at the planting period. In addition, reduced precipitation during the January-February period and excessive rains in April in the main producing Santa Cruz Department adversely affected yields. The recent rains improved soil moisture conditions for the ongoing planting of winter maize, wheat and sorghum crops. As the weather forecast points to above-average precipitation during the crop development stage between May and July, the 2019 wheat and sorghum production is forecast at above-average levels due to an upturn in yields. The positive prospects for the 2019 wheat crop also reflect an increase in the Government's procurement prices in wheat ([FPMA policy](#)), contributed to larger plantings.

FAO's preliminary forecasts put the 2019 cereal production at a near-average level, as the positive prospects of the winter season production offset the reduced outputs of the summer crops.

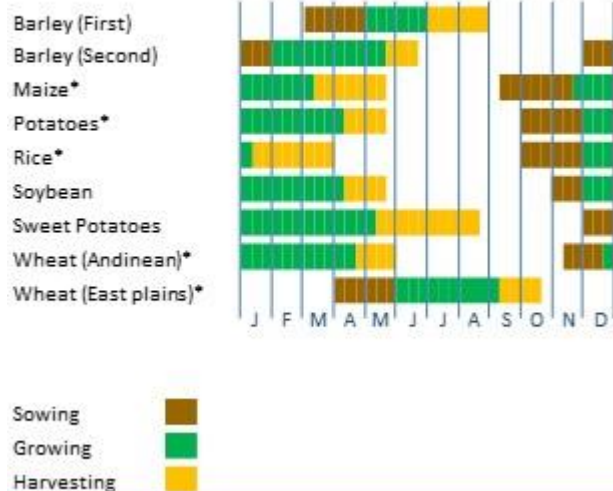
Cereal imports in 2018/19 marketing year expected to decline to below-average levels

Cereal import requirements in the 2018/19 marketing year (July/June) are expected at below-average levels of 509 000 tonnes. This mainly reflects a decline in wheat and maize imports, following good outputs from the 2017/18 agricultural season.

Bolivia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Bolivia

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	1 010	1 000	950	-5.0
Sorghum	709	670	720	7.5
Rice (paddy)	474	480	475	-1.0
Others	351	281	377	34.2
Total	2 544	2 431	2 522	3.7

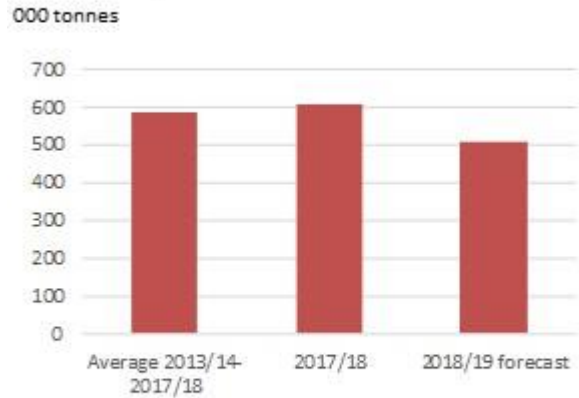
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Maize prices declined in April in line with seasonal trends

In April, prices of yellow maize decreased seasonally with the 2019 summer crop harvest. While prices were slightly below year-earlier levels in the major producing Santa Cruz Department, they were 12 percent higher year on year in the capital, La Paz. In most markets, prices of rice were generally lower than in April last year reflecting adequate supplies. Prices of wheat flour, mostly imported from Argentina, weakened in April, but remained generally higher year on year.

Bolivia

Cereals Imports

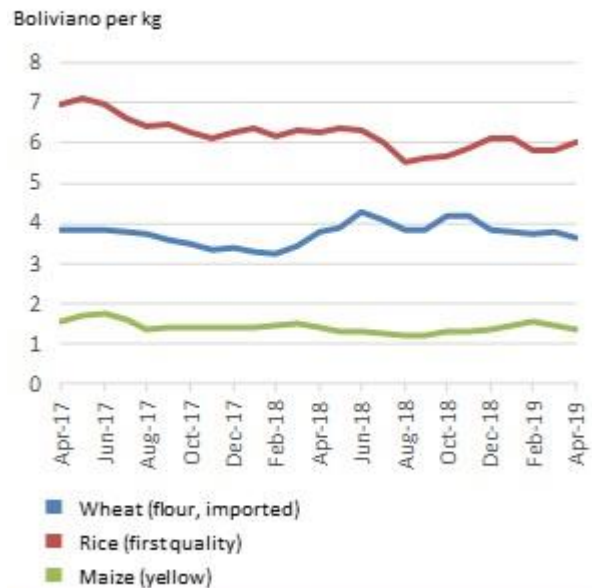


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Bolivia

Wholesale prices in Santa Cruz



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

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GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 27-October-2017

FOOD SECURITY SNAPSHOT

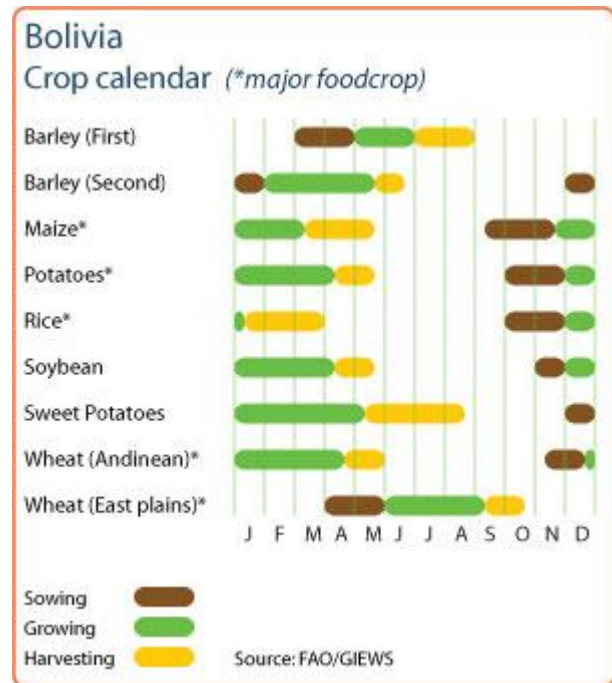
- Cereal production anticipated to recover in 2017 from last year's drought
- Cereal imports in 2017/18 marketing year expected to decline from record levels
- Cereal prices generally stable in September and below year-earlier levels

Cereal production anticipated to recover in 2017 from last year's drought

Cereal production in 2017 is forecast to recover from last year's drought-reduced levels. The 2017 summer crops, including maize and rice, were harvested in May. Maize yields were marginally affected by dry weather conditions at the beginning of the season. By contrast, the summer rice crop was more impacted, as the dry weather reduced water availability. The 2017 winter crops, whose harvest is underway and will be finalized in November, progressed under generally favourable weather conditions. FAO forecasts 2017 cereal output at an average of 2.3 million tonnes. This mainly reflects an anticipated strong recovery in maize production, particularly during the winter season, and a good wheat harvest. Part of the recovery also reflects the support of the Government, in close collaboration with the private sector, to aide in the recovery of agricultural outputs from their drought-reduced levels of 2016, including the distribution of inputs at a lower cost. In addition, the Government has also increased the public purchase price of crops, particularly for wheat.

Cereal imports in 2017/18 marketing year expected to decline from record levels

FAO's initial forecast for cereal import requirements in the 2017/18 marketing year (July/June) points to a sharp reduction from last year's record highs of 824 000 tonnes to 521 000 tonnes. This mainly reflects a strong decline in maize imports, as domestic production was significantly affected in 2016 by drought. Wheat imports are also anticipated to decline, but at a smaller rate.



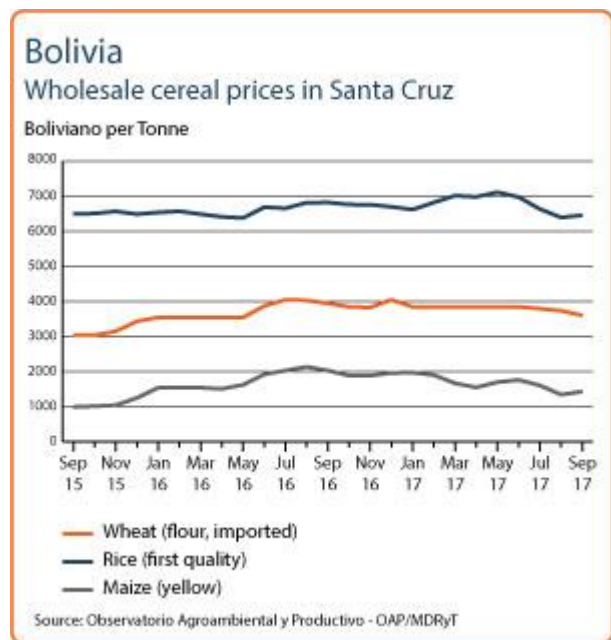
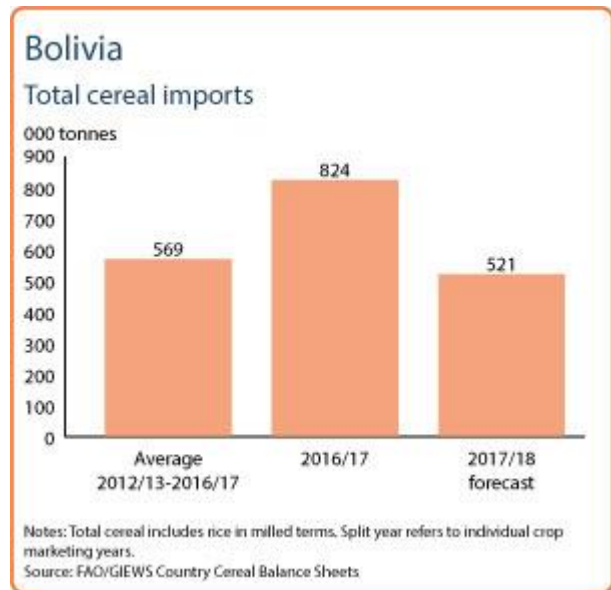
Bolivia
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	990	643	1 200	87
Sorghum	560	395	415	5
Rice (paddy)	471	407	380	-7
Others	320	258	311	21
Total	2 340	1 703	2 306	35

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

Cereal prices generally stable in September and below year-earlier levels

Prices of mostly imported wheat flour remained overall unchanged in September and were down from a year earlier reflecting abundant imports in the form of grain and flour, mostly from Argentina. By contrast, prices of yellow maize followed mixed trends across the markets in September, but were significantly below their year-earlier levels reflecting the good 2017 output and imports. Rice prices continued relatively unchanged, reflecting adequate imports from neighbouring countries that compensated for a decline in this year's output.



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GIEWS Country Brief

Bolivia (Plurinational State of)

Reference Date: 17-February-2017

FOOD SECURITY SNAPSHOT

- **Uncertain prospects for 2017 cereal output**
- **Locust infestation threaten crops in Santa Cruz**
- **Cereal imports in 2016/17 marketing year anticipated to increase**
- **Cereal prices stable in January, however, maize prices remained at high levels reflecting tight supply levels**

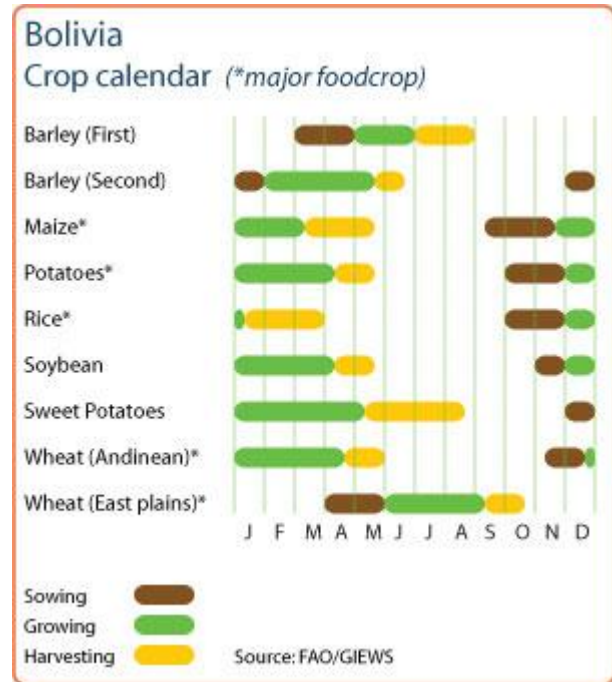
Uncertain prospects for 2017 cereal output

Planting of the 2017 summer crop concluded in December. Official data on plantings are not yet available, but prospects are uncertain as precipitations were mostly below average during the September to October period, when the bulk of the planting took place. Below-average precipitations have continued through January resulting in major areas being affected by severe dry weather, including the main department of Santa Cruz, which accounts for more than half of national output. Compounding the effects of the dry weather in early February, a severe locust infestation affected 1 000 ha in 5 of the 15 municipalities of Santa Cruz, with another 33 000 ha, or 3 percent of total available arable area in the department, under threat from a further advance of the pest. The Government has declared a state of emergency in the region and has begun to fumigate and provide farmers with access to pesticides, making immediately available USD 700 000 for this effort. FAO is assisting in this process, as well as developing a short term plan to manage the pest infestation and prevent a further expansion of the pest.

The current uncertainty for the 2017 cereal crop follows a severely reduced 2016 cereal output. The 2016 summer and winter cereal crops were impacted by prolonged dry weather and high pest infestations. FAO preliminary estimate points to a reduction in aggregate cereal output in 2016 to less than 2 million tonnes, its lowest level in more than five years.

Cereal imports in 2016/17 marketing year anticipated to increase

The latest FAO forecast for cereal import requirements in the 2016/17 marketing year (July/June) point to an increase of some



Bolivia Cereal production

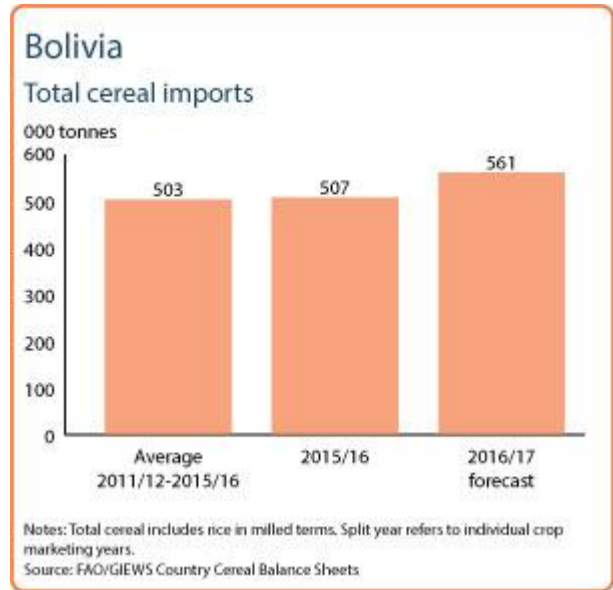
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	1 052	1 200	900	-25
Sorghum	559	630	395	-37
Rice (paddy)	449	472	360	-24
Others	311	326	258	-21
Total	2 372	2 628	1 913	-27

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

10 percent to 556 000 tonnes, reflecting this year's reduced outputs. Most of the anticipated increase in imports reflects higher purchases of maize and wheat.

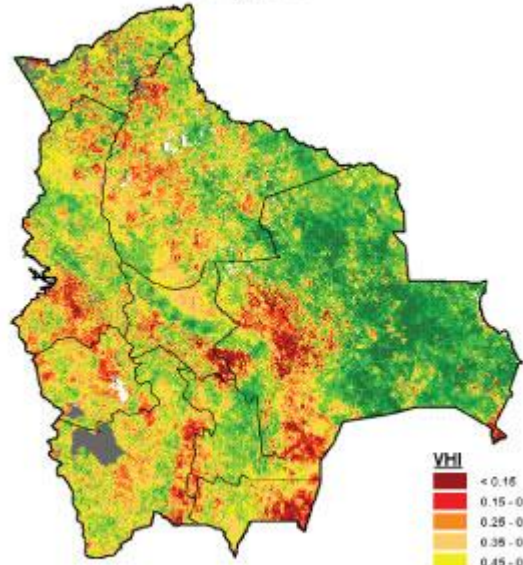
Cereal prices stable in January, however, maize prices remained at high levels reflecting tight supply levels

Prices of wheat flour eased further in January mainly as a result of imports, which eased the tight supply situation resulting from the drought-reduced 2016 domestic crop. However, prices in the main producing region Santa Cruz remained some 9 percent above last year's level reflecting the tight supply situation. Yellow maize prices also declined in most markets with the recently-harvested 2016 secondary crop and imports, but remained at levels well above those a year earlier after the sharp increases in the first half of last year, due to the drought-reduced main season harvest.



Bolivia - Vegetation Health Index (VHI)

January 2017





GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 29-November-2016

FOOD SECURITY SNAPSHOT

- Cereal output in 2016 estimated at sharply reduced level
- Cereal imports in 2016/17 marketing year anticipated to increase
- Cereal prices stable in November, but low availabilities maintained prices at high level

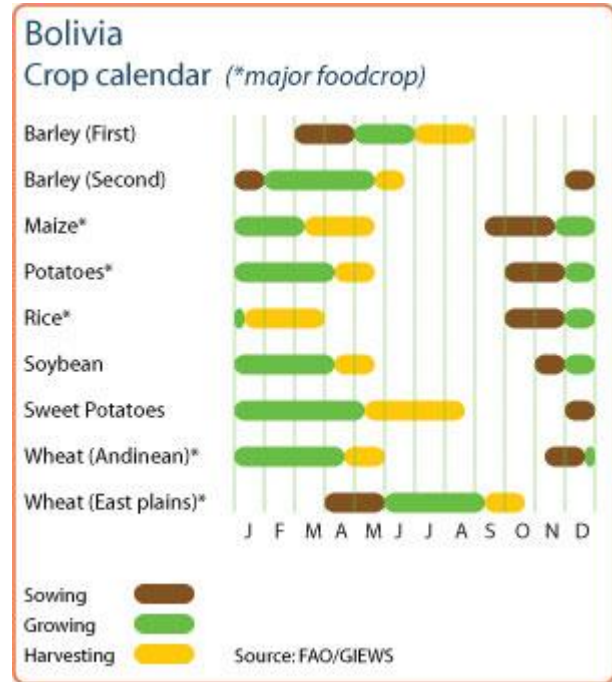
Cereal output in 2016 estimated at sharply reduced level

Cereal production in 2016 is estimated at a sharply reduced level, as the summer and winter cereal crops were severely affected by drought conditions and high pest infestations. FAO preliminary estimate points to a reduction in aggregate cereal output in 2016 to less than 2 million tonnes, its lowest level in more than five years. Although the official estimates of the losses to the agricultural sector are not yet available, early reports from producer organizations point to losses as high as USD 485 million, or 14 percent of the agricultural gross domestic product in 2015. On 21 November, the Government declared a national state of emergency as 162 000 families were affected by the drought and 607 000 hectares of crop land were impacted, including some 600 000 heads of cattle.

Planting of the 2017 summer crop is virtually concluded. Official data on plantings are not yet available, but prospects are uncertain as precipitations were mostly below average during the September to October period, when the bulk of the planting takes place. Latest remote sensing data still shows significant areas impacted by severe dryness during the second dekad of November, including parts of Santa Cruz, the country's most productive province. The Government is assisting farmers by providing inputs, including seeds and fertilizers, as well as improving irrigation infrastructure such as wells.

Cereal imports in 2016/17 marketing year anticipated to increase

The latest FAO forecast for cereal import requirements in the 2016/17 marketing year (July/June) point to an increase of some



Bolivia Cereal production

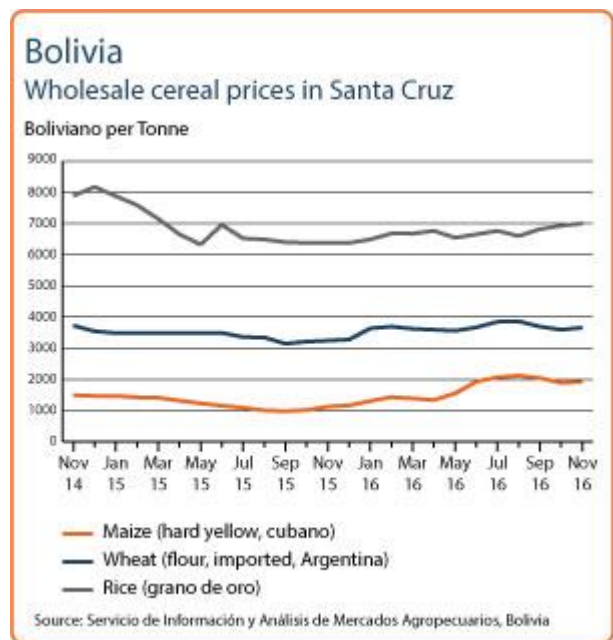
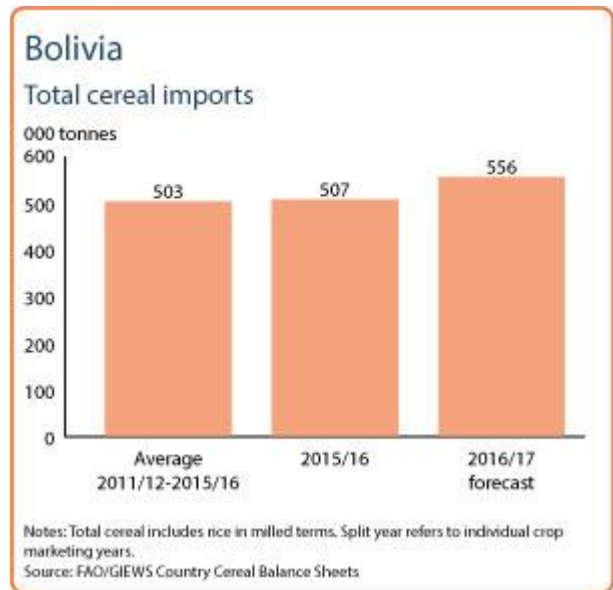
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	1 052	1 200	900	-25
Sorghum	559	630	395	-37
Rice (paddy)	449	472	360	-24
Others	311	326	258	-21
Total	2 372	2 628	1 913	-27

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

10 percent to 556 000 tonnes, reflecting this year's reduced outputs. Most of the anticipated increase in imports reflects higher purchases of maize and wheat.

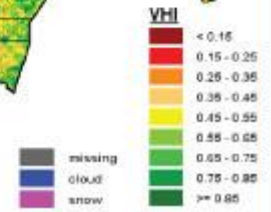
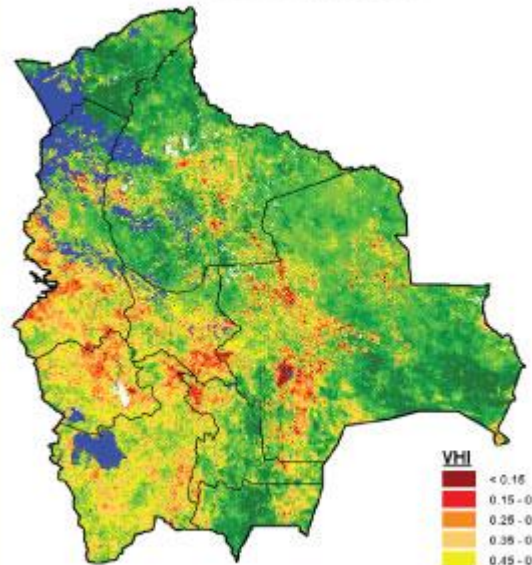
Cereal prices stable in November, but low availabilities maintained prices at high level

Yellow maize prices were relatively unchanged in November, but remained more than 70 percent above their year earlier levels across the main markets reflecting tight market supplies due to the drop in this year's production. Wheat and wheat flour prices were also stable in November and relatively unchanged from a year ago as recent wheat imports are supplying the local markets. Rice prices trended slightly upwards in November as this year's reduced output continues to sustain prices at relatively high levels.



Bolivia - Vegetation Health Index (VHI)

2nd Dekad November 2016





GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 22-September-2016

FOOD SECURITY SNAPSHOT

- **Cereal output in 2016 estimated at sharply reduced level**
- **Cereal imports in 2016/17 marketing year anticipated to increase**
- **Wheat and maize prices increased in August, underpinned by low availabilities**

Cereal output in 2016 estimated at sharply reduced level

Cereal production in 2016 is estimated at a sharply reduced level, as the summer and winter cereal crops were severely affected by drought conditions and high pest infestations. A preliminary estimate points to a reduction in aggregate cereal output in 2016 to 2 million tonnes, 23 percent below the previous year's level and below the five-year average. Losses to the agricultural sector due to the drought are estimated at USD 240 million. Planting of the 2017 summer crop will begin from the end of September, sowing levels for the season remain uncertain. According to remote sensing data, precipitation levels had improved by the beginning of September. However, high incidence of dryness still remained in the main producing province of Santa Cruz. High levels of debt is also affecting the ability of farmers to access much needed inputs such as seeds and fertilizers. The Government is seeking financial resources to provide financing, particularly to small farmers, for these inputs.

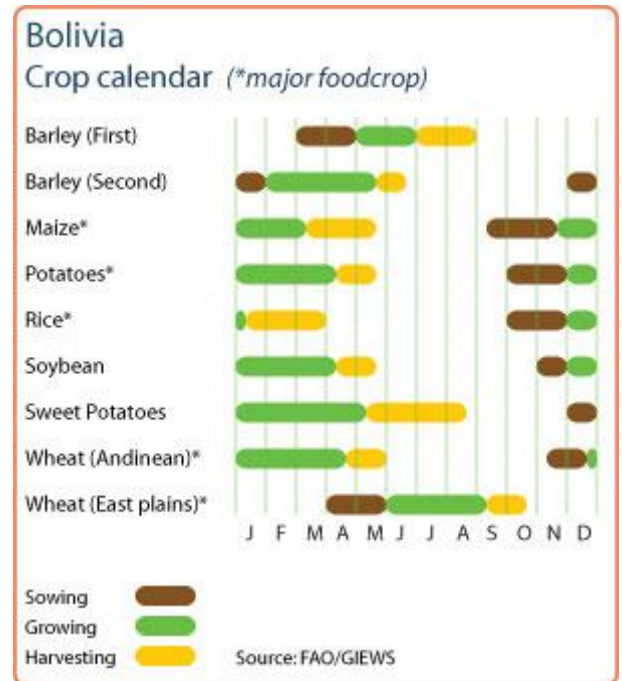
Cereal imports in 2016/17 marketing year anticipated to increase

Cereal imports in the 2016/17 marketing year (July/June) are expected to increase some 22 percent, reflecting this year's reduced outputs and reach 581 000 tonnes. Most of the anticipated increase in imports reflects higher purchases of maize and wheat.

Wheat and maize prices increased in August, underpinned by low availabilities

Yellow maize prices increased for the third consecutive month in August and were well above their year-earlier levels, underpinned by the drought-reduced 2016 crop.

Prices of wheat flour generally strengthened and were above their levels in August last year, underpinned by reduced market

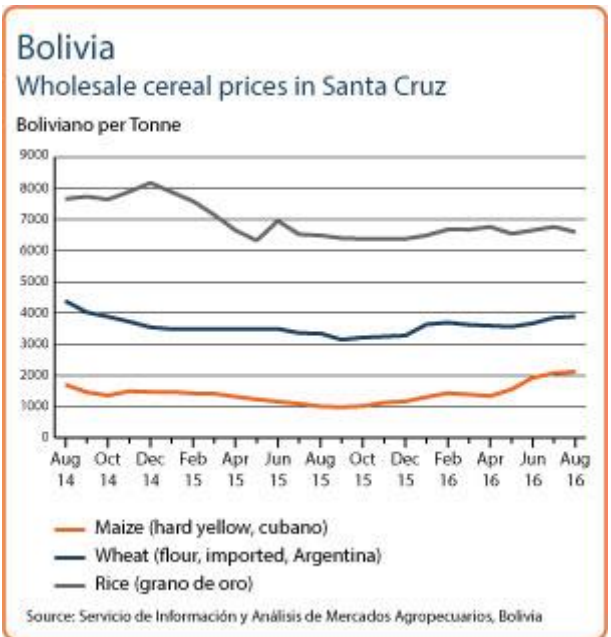
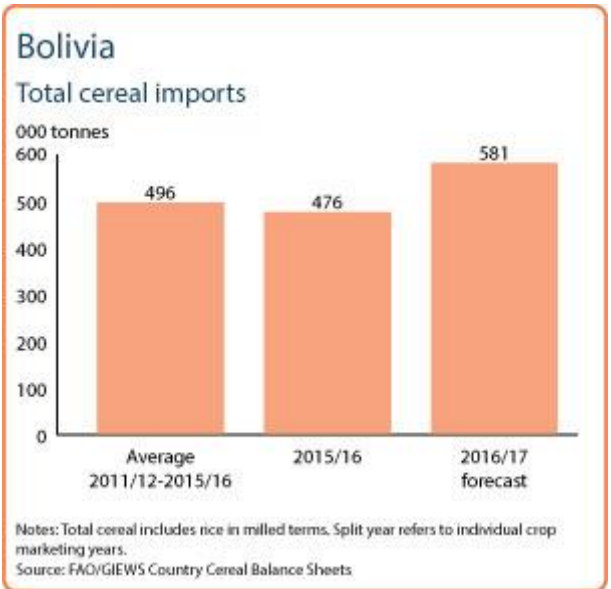


Bolivia
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes		percent	
Maize	1,052	1,200	1,000	-17
Sorghum	559	630	395	-37
Rice (paddy)	449	472	360	-24
Others	311	326	278	-15
Total	2,372	2,628	2,033	-23

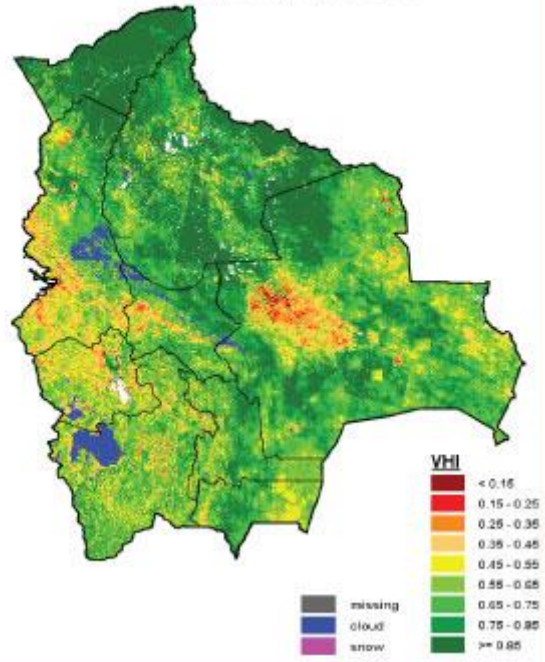
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

supplies following a decline in this year's output and lower imports of wheat in the past months.



Bolivia - Vegetation Health Index (VHI)

1st Dekad September 2016





GIEWS Country Brief Bolivia (Plurinational State of)

Reference Date: 20-July-2016

FOOD SECURITY SNAPSHOT

- Cereal output for 2016 forecast at sharply reduced level
- Cereal imports in 2016/17 marketing year anticipated to increase
- Maize prices surge in first half of July, rice and wheat flour prices increase moderately

Cereal output for 2016 forecast at sharply reduced level

Harvest of the 2016 summer cereal crop concluded in June and production for the season has been estimated at a sharply reduced level, particularly in the main producing Province of Santa Cruz. The reduction in output reflects lower plantings, drought conditions towards the end of the season and high pest infestations. Planting of the 2016 winter crop also concluded in June, no official estimates are yet available for the area sown. However, plantings are expected to be reduced as sowing conditions were impacted by the lower levels of precipitation during May and June. A preliminary forecast points to a reduction in aggregate cereal output for 2016 of 23 percent to 2 million tonnes, below the five-year average.

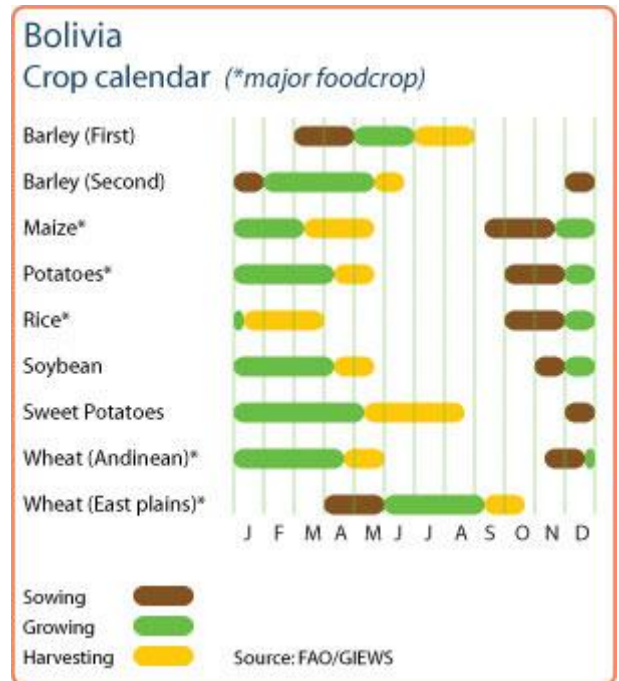
Cereal imports in 2016/17 marketing year anticipated to increase

Cereal imports in the 2016/17 marketing year (July/June) are expected to increase some 22 percent, reflecting this year's reduced outputs and reach 581 000 tonnes. Most of the anticipated increase in imports reflects higher purchases of maize and wheat.

Maize prices surge in first half of July, rice and wheat flour prices increase moderately

Prices of maize surged as high as 30 percent in the first two weeks of July and are between 28 and 88 percent above their level a year earlier across the main markets. Prices are being sustained by the tight supplies in the market following the reduced 2016 winter crop harvest.

Prices of wheat flour, which is mostly imported, increased moderately during the first half of July and are between 13 and 20 percent above their level at the same time last year in the main markets, reflecting this year's reduced outputs.

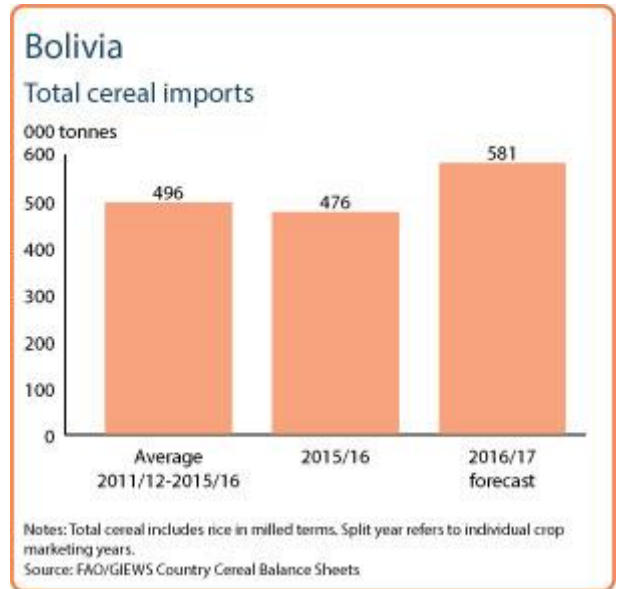


Bolivia
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	1,052	1,200	1,000	-17
Sorghum	559	630	395	-37
Rice (paddy)	449	472	360	-24
Others	311	326	278	-15
Total	2,372	2,628	2,033	-23

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

Rice prices followed mixed trends in the first half of July, however, prices remained well above their level at the same period last year as a result of this year's reduced harvest.



Reference Date: 12-February-2016

FOOD SECURITY SNAPSHOT

- Plantings of 2016 summer maize crop to decline
- Total cereal production in 2015 estimated at record levels
- Cereal imports in 2015/16 marketing year anticipated to decline
- Wheat flour and yellow maize prices increased in January

Plantings of 2016 summer maize crop estimated to decline

Sowing of the main 2015/16 summer season maize crop was concluded in early December last year. Latest estimates point to a 27 percent contraction from last year's level to 80 000 hectares, mainly reflecting low market prices.

Total cereal production in 2015 estimated at record levels

Cereal production in 2015 is estimated to have increased by some 6 percent from the previous year to 2.6 million tonnes, the highest level in the past ten years. This mainly reflects higher maize and rice outputs as a result of increased yields. Wheat production, however, declined from the high level of the previous year but remained well above the country's five-year average.

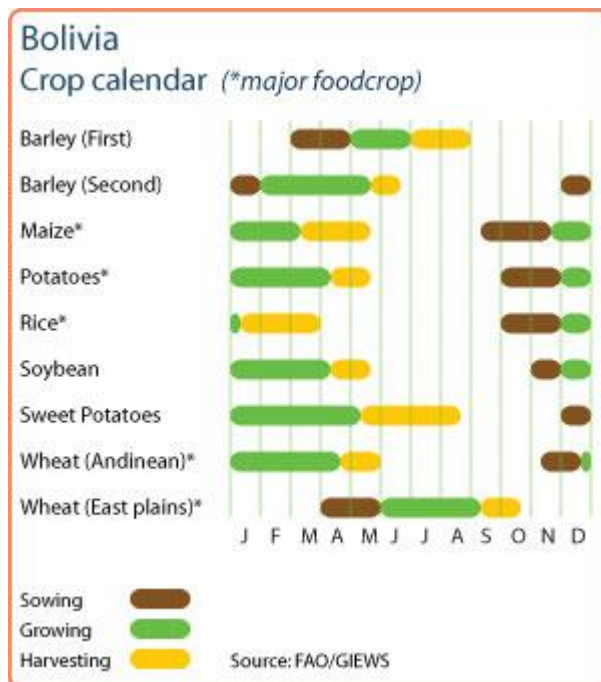
Cereal imports in 2015/2016 marketing year anticipated to decline

Cereal imports in the 2015/16 marketing year (July/June) are expected to decline from the high levels of the previous two years, mainly reflecting high Government stocks, particularly of maize and wheat. Overall, cereal imports are tentatively forecast at 476 000 tonnes, some 20 percent below last year's level.

Wheat flour and yellow maize prices increased in January

Prices of imported wheat flour increased by 12 percent in January in the main Santa Cruz market and were slightly higher than a year earlier, mainly reflecting the reduced output last year.

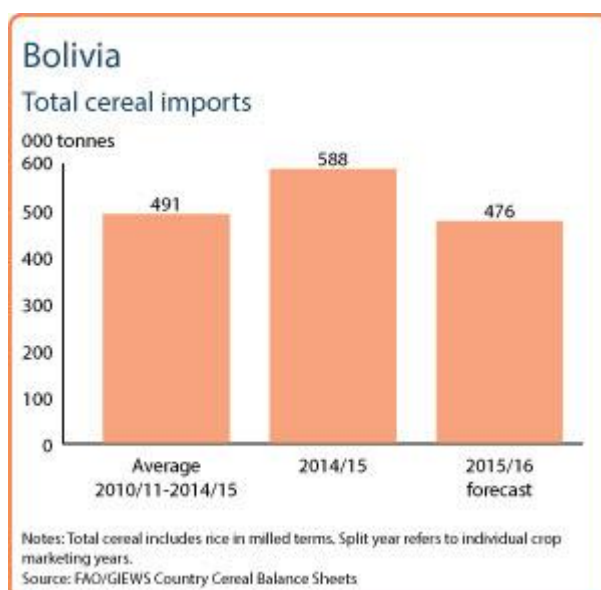
Yellow maize prices also increased in January reflecting seasonal trends, but were lower than a year earlier due to adequate availabilities from the good 2015 production.



Bolivia
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	994	1,110	1,200	8
Sorghum	507	631	630	0
Rice (paddy)	445	378	472	25
Others	310	353	326	-8
Total	2,256	2,472	2,628	6

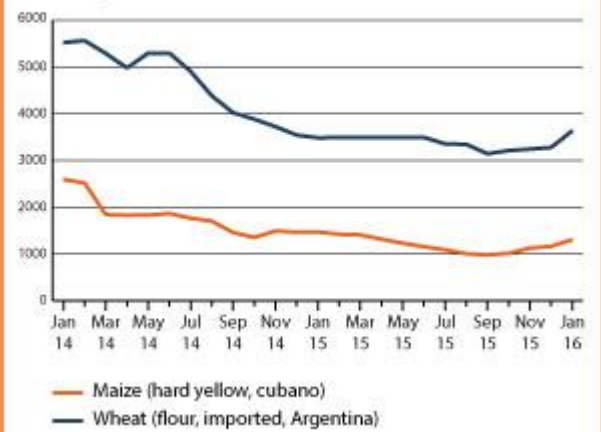
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Bolivia

Wholesale cereal prices in Santa Cruz

Boliviano per Tonne



Source: Servicio de Información y Análisis de Mercados Agropecuarios, Bolivia

Reference Date: 27-October-2014

FOOD SECURITY SNAPSHOT

- Good prospects for maize and wheat production in 2014
- Maize and wheat flour prices fall further in October
- Heatwave emergency in 14 Santa Cruz municipalities

Good prospects for maize and wheat production in 2014

Harvesting of the July-November winter maize and wheat crop, which accounts for about 30/40 percent of annual maize production and is the main wheat crop, is currently under way.

The total production of wheat (summer and winter crops) for this year is expected to reach a level of around 275 000 tonnes, 4 percent below the record 2013 harvest, but still 22 percent above the average of the last five years. This high production level reflects an increase in area planted and higher yields in 2013 and 2014 for both the summer and the winter crops. Despite this increase, however, domestic production only covers 35 percent of the country's consumption needs, and the government continues to import large volumes of wheat grain and flour, mainly from Argentina, the United States of America and Uruguay. In the case of maize, production of 1.1 million tonnes is forecast for the year, very similar to the record levels achieved in 2012 and 2013. The high level of production this year is explained mainly by an increase in area sown and the output of the winter crop, in response to the production incentives granted by the government. In contrast, rice, which is only grown as a summer crop (October-June), is expected to produce a small harvest of 357 000 tonnes, similar to the low 2013 levels, owing to heavy rainfall during the planting period.

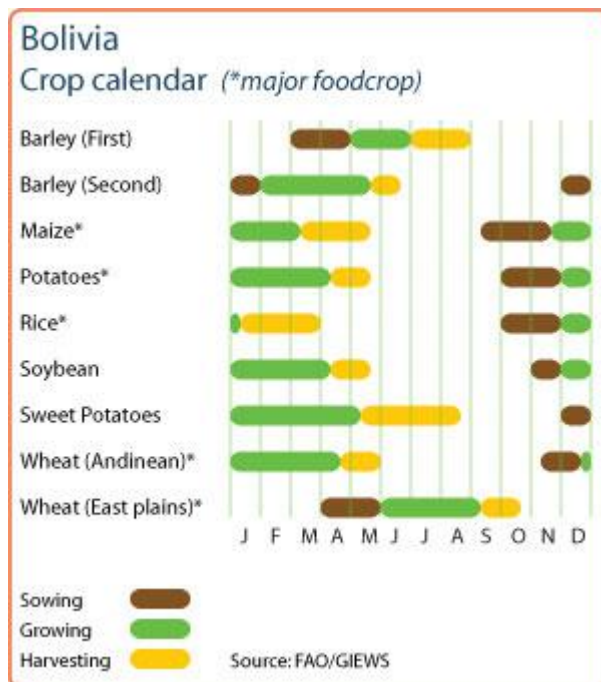
Total cereal production in 2014 is set to be around 2.5 million tonnes, slightly above the previous year's level.

Maize and wheat flour prices fall further in October

Maize prices in October have continued the downward trend which began in July following the main summer harvest, and are more than 20 percent below their levels of a year ago. Wheat flour prices have also fallen sharply in recent months, and in October were nearly 40 percent lower than a year earlier, as a result of the large volume of imports and good prospects for the winter crop.

Heatwave emergency in 14 Santa Cruz municipalities

An intensive heatwave has hit the departments of Santa Cruz, La Paz and Chuquisaca in the last few weeks. On 22 October, the Department of Santa Cruz declared a drought emergency in 12 municipalities; and two further municipalities were added to the list on 25 October, one because of drought and the other for lack of water. The Government activated a contingency plan which includes dispatching 22 tankers containing drinking water, and it allocated BOB 4 million (USD 575 000) to help the 30 000 worst affected families.



Bolivia
Cereal production

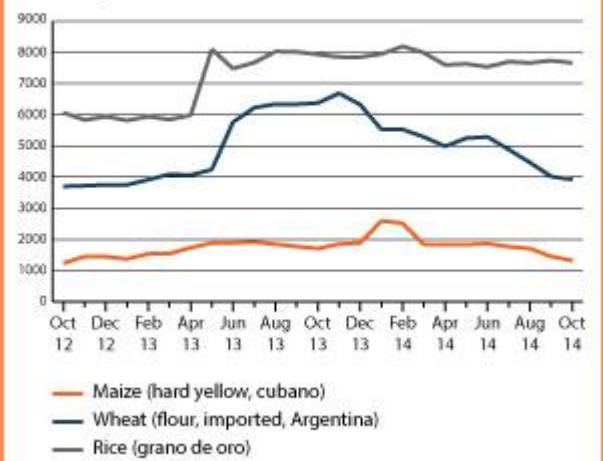
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Maize	984	1,109	1,110	0
Sorghum	460	592	631	7
Rice (paddy)	456	360	357	-1
Others	304	365	353	-3
Total	2,204	2,426	2,451	1

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

Bolivia

Wholesale cereal prices in Santa Cruz

Boliviano per Tonne



Source: Servicio de Información y Análisis de Mercados Agropecuarios, Bolivia

Reference Date: 10-March-2014

FOOD SECURITY SNAPSHOT

- Cereal and potato production significantly reduced in 2013
- Cereal imports forecast to increase in 2013/14 marketing season
- Cereal and potato prices continue at high levels

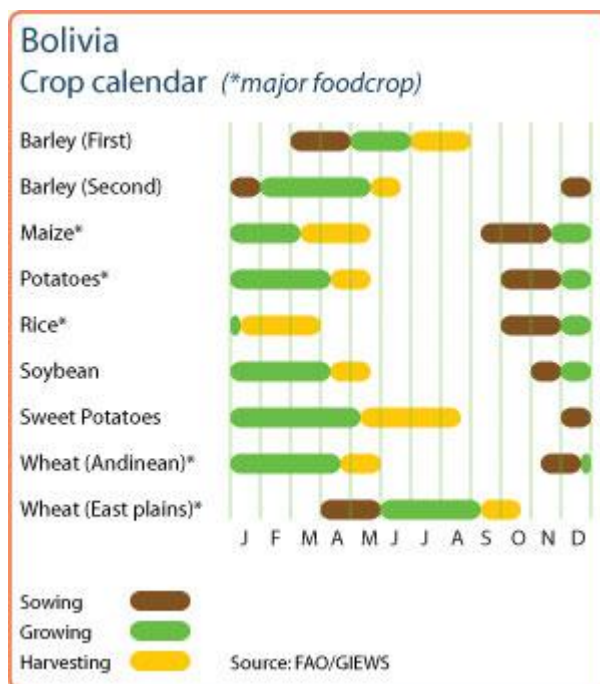
Severe floods affected large numbers of people and caused agriculture damage in the northern Beni department

Heavy rains during January and the first half of February 2014 caused rivers to overflow resulting in floods in the low-lying areas of the department of Beni and its southern borders with the departments of Cochabamba and Santa Cruz where landslides occurred. Preliminary official assessments indicate loss of life and serious damage to housing and infrastructure, with at least 60 000 families directly affected. On 27 January, the Government declared a state of emergency in Beni - as well as in several municipalities across the country - and has begun to coordinate and distribute humanitarian assistance, including food and temporary shelter, for the displaced population. A detailed assessment of the agriculture losses is still not available, but it is anticipated that the livestock is the most affected sector. The department of Beni is the most important bovine livestock producer, accounting for more than 42 percent of the national herd. Early official estimates by 8 February point to almost 60 000 heads of animals lost - or less than 1 percent of the national herd. However, another 1.8 million heads are at risk of disease from the excessive humidity and lack of feed due to the extensive flooding of pasture land; this number represents 21 percent of the national herd and more than half of the bovine cattle population in the department.

With respect to cultivated land, estimates indicate that close to 43 000 hectares of different crops, including rice, maize and cassava, have been negatively impacted by the heavy rains and floods. The department of Beni accounts for 6 percent of national annual rice production and less than 2 percent of total maize output. While the potential crop losses at the national level may not be substantial, the impact on local production and for small farmers - who have suffered partial or total losses of crops and livestock - is severe. The paddy crop, which started to be harvested, is likely to be the most affected as three of the four important rice-producing provinces in the department - Cercado, Marban and Moxos - were hit by the flooding. To mitigate the potential reduction of household income due to crop losses, the Government, in mid-February, created a special fund under its national crop insurance programme worth BOB 24 million (more than USD 3.5 million) to provide BOB 1 000 per hectare of destroyed cropped land.

Production outlook for the 2014 cereal crops remain favourable

At the moment of the severe flooding, the 2014 main "de verano" season maize crop was in an advance vegetative stage, while harvesting of the rice crop had just begun. Despite the crop losses in the department of

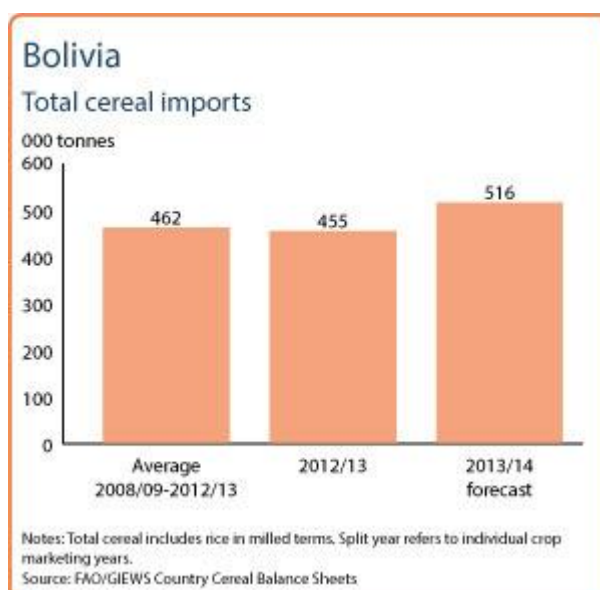


Bolivia

Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes			percent
Maize	967	1 006	875	-13
Rice (paddy)	458	520	450	-13
Sorghum	398	478	400	-16
Others	311	289	278	-4
Total	2 133	2 293	2 003	-13

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



Beni, the overall prospects for this year's "de verano" season remain favourable, since the main cereal producing departments - Santa Cruz, La Paz and Cochabamba - have not been severely affected and the abundant rains may have benefited the developing crops in parts. The net effect on total production would need to be assessed later in the season. The rainy season typically goes until March/April and FAO/GIEWS will continue to closely monitor the crop situation.

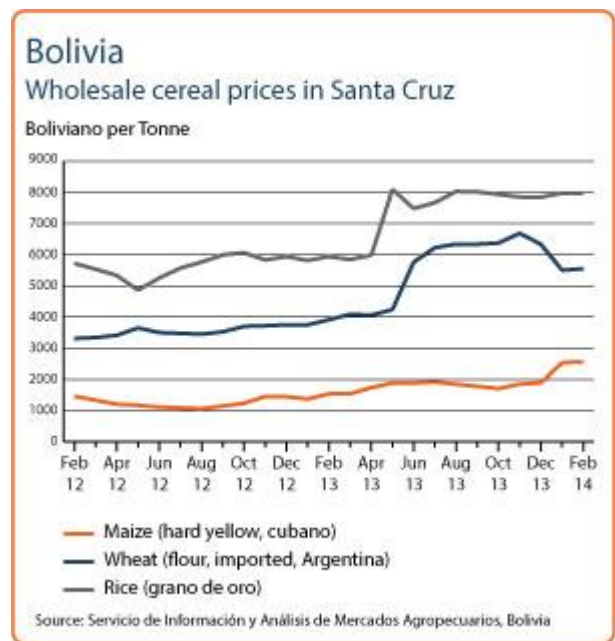
The 2013 aggregate cereal production (first and second seasons gathered until last October) was significantly reduced due to drought conditions and low temperatures during key stages of the cropping season. Aggregate maize production (main and secondary seasons) was estimated at 875 000 tonnes, 13 percent below the previous year's level. Rice production also declined by 13 percent, while wheat was estimated 4 percent less than the below-average 2012 wheat production.

Cereal imports to increase for 2013/14 marketing year (May/April)

As a result of the reduced 2013 production, cereal imports for the 2013/14 marketing season (May/April) are forecast at 516 000 tonnes or 13 percent above last year's level. The bulk of this amount is wheat and wheat flour, but the increase also reflects higher imports of maize due to the contraction in 2013 production.

Prices of wheat and maize remain high

In February, flour prices strengthened somewhat and were significantly higher than at the same time last year. Prices were supported by low 2013 production and low stocks in Argentina, from where the country imports most of its wheat. However, common bread prices remained stable as a result of government subsidies that in 2013 increased to USD 34 million. Maize prices in February were relatively stable but remained almost two thirds above their levels from February 2013.



Reference Date: 12-December-2013

FOOD SECURITY SNAPSHOT

- Cereal and potato production significantly reduced in 2013
- Cereal imports forecast to increase in 2013/14 marketing season
- Cereal and potato prices continue at high levels

Cereal and potato production significantly declined in 2013

The harvest of the 2013 second season maize and wheat crops was completed in October and November, respectively. Aggregate maize production (main and secondary seasons) is estimated at 875 000 tonnes, 13 percent below last year as a result of lower yields due to adverse weather conditions in July and August, especially low temperatures in the main producing areas of the departments of Santa Cruz, Cochabamba, La Paz, Tarija and Chuquisaca. The cold wave during July and August also damaged potato crops and affected large number of rural households. To assist the affected vulnerable population, the Government distributed food packages and animal feed in September and October.

Cereal imports in 2013/14 marketing season forecast to increase

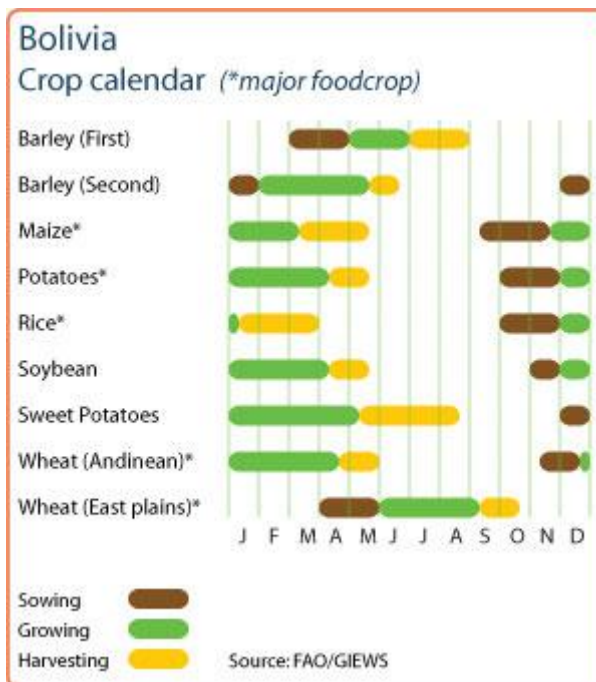
Cereal imports for the 2013/14 marketing season (May/April) are forecast at 516 000 tonnes or 13 percent above last year's level. While the bulk of this amount is wheat and wheat flour, the increase is mainly due to higher imports of maize reflecting this year's contraction in production.

Cereal and potato prices continue at high levels

Wholesale prices of potatoes in La Paz and Cochabamba decreased by 23 percent and 17 percent respectively in December but were still above their levels of a year earlier. Overall, however, in the main producing areas of Chiquisaca and Tarija, potato prices were almost 10 percent higher than in December 2012 reflecting the 2013 reduced output.

The price of wheat flour—which is mostly imported—decreased by about 6 percent in October but remained at near record levels. However, prices of bread remained stable reflecting subsidies under agreements between the Government and the bakery industry.

Similarly, rice and maize prices in December remained one-third above their year-earlier levels, although relatively unchanged from the previous month, as a result of this year's reduced productions.

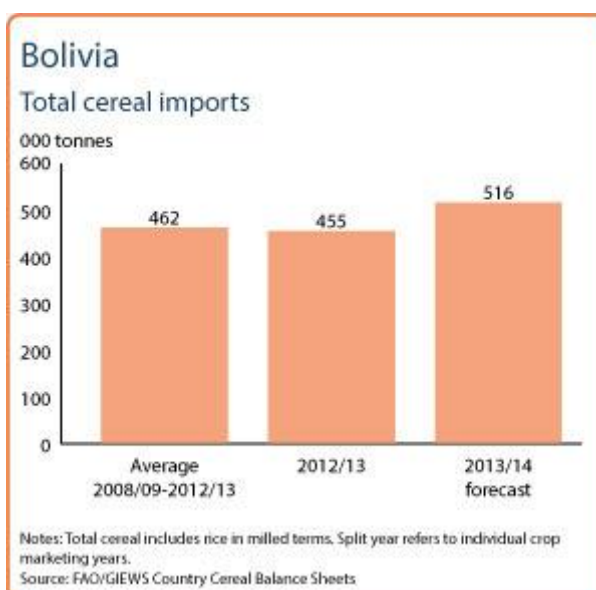


Bolivia

Cereal production

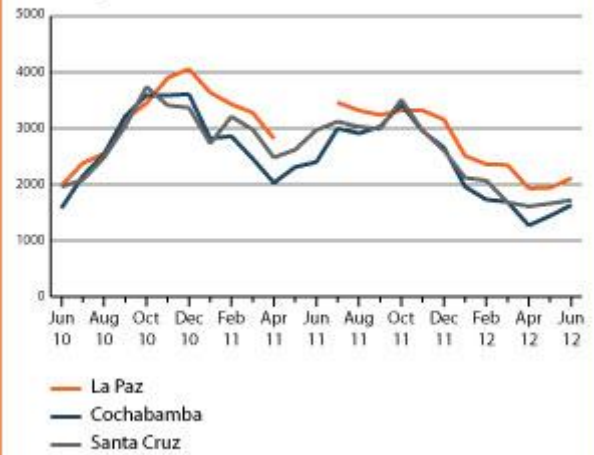
	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	967	1 006	875	-13
Rice (paddy)	458	520	450	-13
Sorghum	398	478	400	-16
Others	311	289	278	-4
Total	2 133	2 293	2 003	-13

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



Bolivia Wholesale potato prices

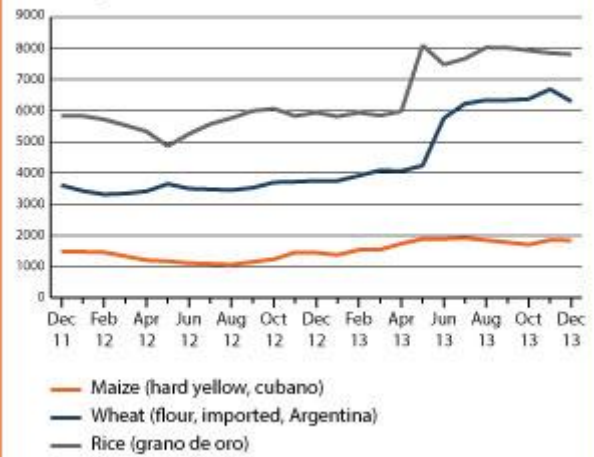
Boliviano per Tonne



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Bolivia Wholesale cereal prices in Santa Cruz

Boliviano per Tonne



Source: Servicio de Información y Análisis de Mercados Agropecuarios, Bolivia

Reference Date: 05-November-2013

FOOD SECURITY SNAPSHOT

- 2013 cereal and potato production reduced by unfavourable weather conditions
- Cereal imports forecast to increase in 2013/14 marketing season
- Cereal and potato prices at high levels

2013 cereal and potato production reduced by unfavourable weather conditions

The harvest of the second season maize and wheat crops has almost been completed. Low levels of humidity in the soil caused by prolonged dry weather at the beginning of the season, followed by a strong cold wave and frosts in July and August negatively affected crop development, particularly in the departments of Santa Cruz, Cochabamba, La Paz, Tarija and Chuquisaca. The frosts and heavy snowfall also damaged potato crops. Production of the 2013 potato crop is forecast to decline sharply. To assist the affected population, the Government distributed food packages and animal feed in September and October.

The 2013 main season maize harvest, which was completed in late May, was also adversely affected by dry weather during the season, especially in Chuquisaca and Tarija departments. Overall, latest estimates indicate a 2013 aggregate output of maize (main and secondary season) of about 875 000 tonnes, 13 percent lower than last year and below the average.

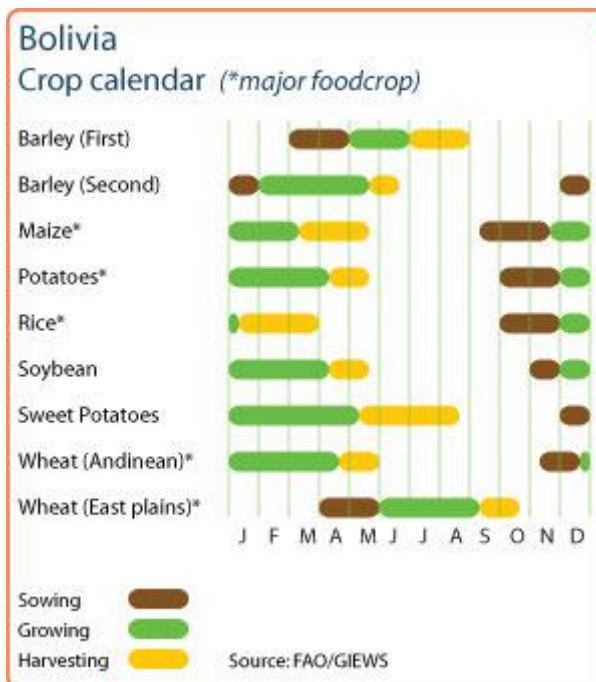
Cereal imports in 2013/14 marketing season forecast to increase

Cereal imports for the 2013/14 marketing season (May/April) are forecast at 516 000 tonnes or 13 percent above last year's level. While the bulk of this amount is wheat and wheat flour, the increase is mainly due to higher imports of maize reflecting this year's contraction in production.

Cereal and potato prices at high levels

Wholesale prices of potatoes in the main Santa Cruz market further increased by 15 percent in October, more than doubling their level of a year earlier. This reflects a reduced output in the main producing areas of Chiquisaca and Tarija.

The price of wheat flour—which is mostly imported—remained relatively unchanged in October but was significantly higher than a year earlier. However, prices of bread remained stable reflecting subsidies under agreements between the Government and the bakery industry.

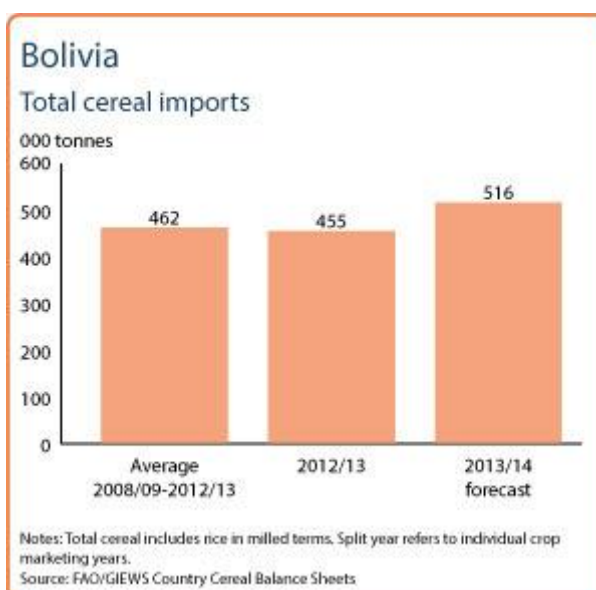


Bolivia

Cereal production

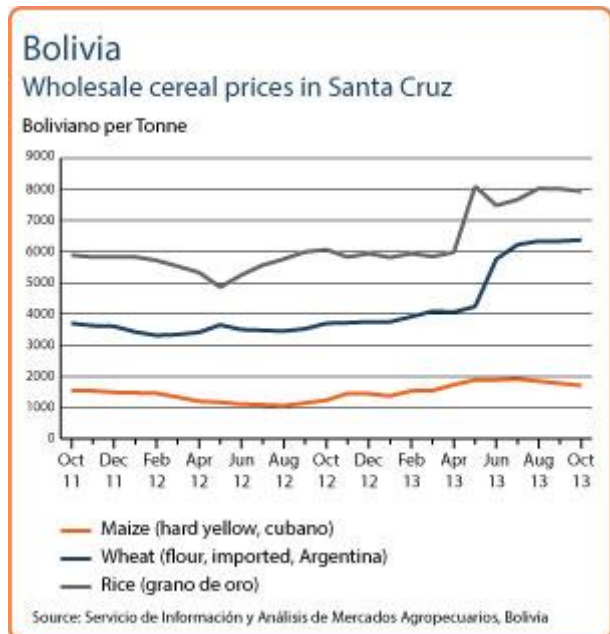
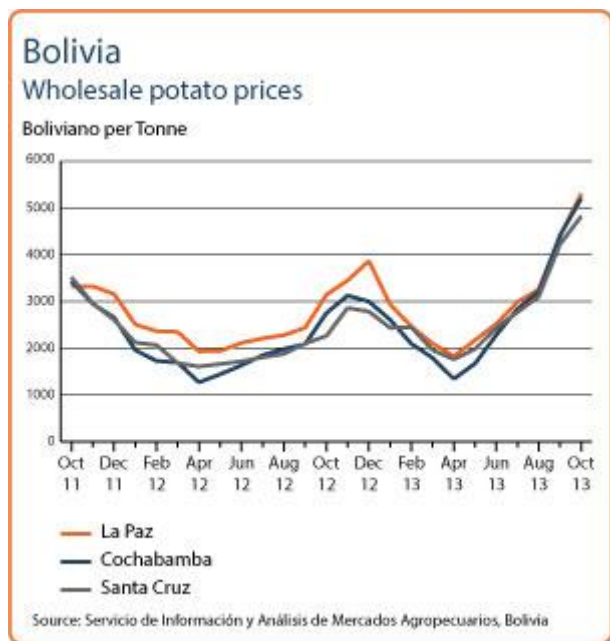
	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	967	1 006	875	-13
Rice (paddy)	458	520	450	-13
Sorghum	398	478	400	-16
Others	311	289	278	-4
Total	2 133	2 293	2 003	-13

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



Rice prices in October decreased marginally from the previous month but were up 30 percent from October 2012 in Santa Cruz as a result of this year's reduced production.

Yellow maize prices declined by 4 percent in October in Santa Cruz and Cochabamba as new supplies from the recently completed harvest entered the market. However, in La Paz, prices increased by 5 percent in October. Overall, prices remained higher than last year by 31 percent in Cochabamba, 38 percent in Santa Cruz and 47 percent in La Paz.



Reference Date: 11-October-2013

FOOD SECURITY SNAPSHOT

- Unfavourable weather conditions severely affect 2013 maize production
- Cereal imports in 2013/14 marketing season forecast to increase
- Cereal and potato prices at high levels
- Adverse weather affects over 80 000 families

Unfavourable weather conditions severely affect 2013 maize production

Harvesting of the second season maize and wheat crops is currently underway. Prolonged dry weather from March to June followed by a strong cold wave with frosts in July and August severely affected crops at different stages of development particularly in the departments of Santa Cruz, Cochabamba, La Paz, Tarija and Chuquisaca.

Assessments on the extent of the damage on the second season maize crop are being carried out in these areas but still are not available. In response, the Government distributed food packages and animal feed in September and October to assist the affected population.

The 2013 main season maize harvest, which was completed in late May, was also negatively affected by dry weather during the season, especially in Chuquisaca and Tarija. Overall, latest forecasts point to a 2013 aggregate output of maize (main and secondary season) of about 875 000 tonnes, 13 percent lower than last year and below the average.

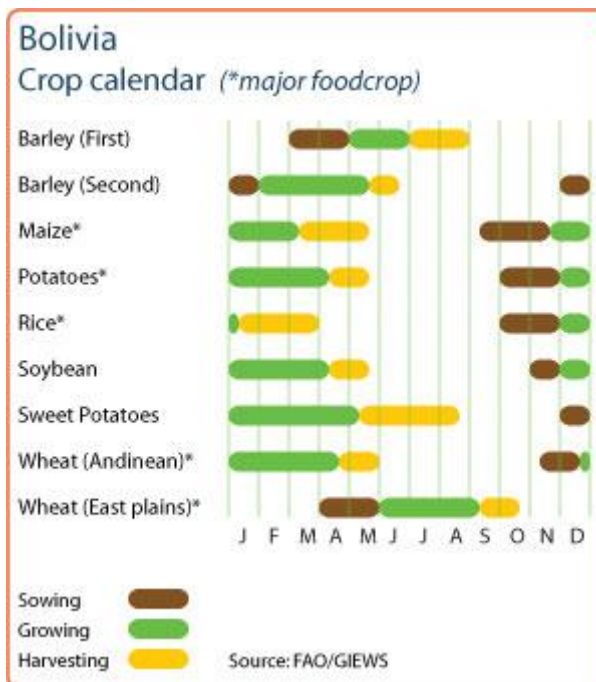
Cereal imports in 2013/14 marketing season forecast to increase

Cereal imports for the 2013/14 marketing season (May/April) are forecast at 516 000 tonnes or 13 percent above last year's level. While the bulk of this amount is wheat and wheat flour, the increase is mainly due to higher imports of maize reflecting this year's contraction in production.

Cereal and potato prices at high levels

Wholesale prices of potatoes increased by 36 percent in September and more than doubling their levels of a year earlier. The high price levels reflect reduced output due to the adverse weather which affected the main producing areas of Chiquisaca and Tarija.

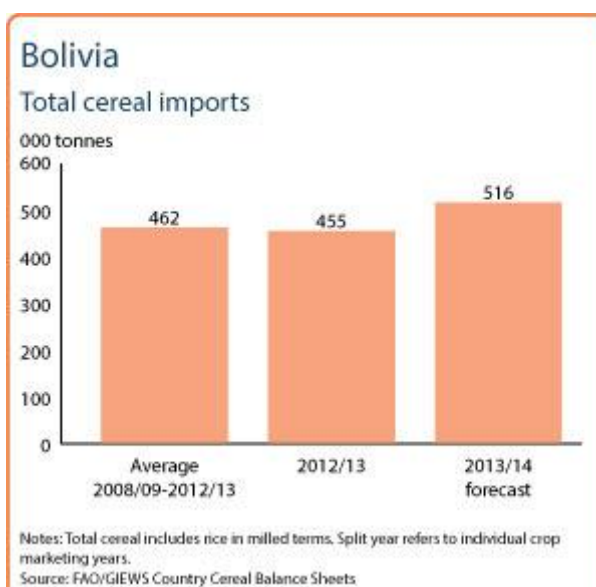
The price of wheat flour—which is mostly imported—remained unchanged in September but remained significantly higher than a year earlier. However, prices of bread remained stable reflecting the Governments subsidy under agreements with national bakeries.



Bolivia
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	967	1,006	875	-13
Rice (paddy)	458	520	450	-13
Sorghum	398	478	400	-16
Others	311	289	278	-4
Total	2,133	2,293	2,003	-13

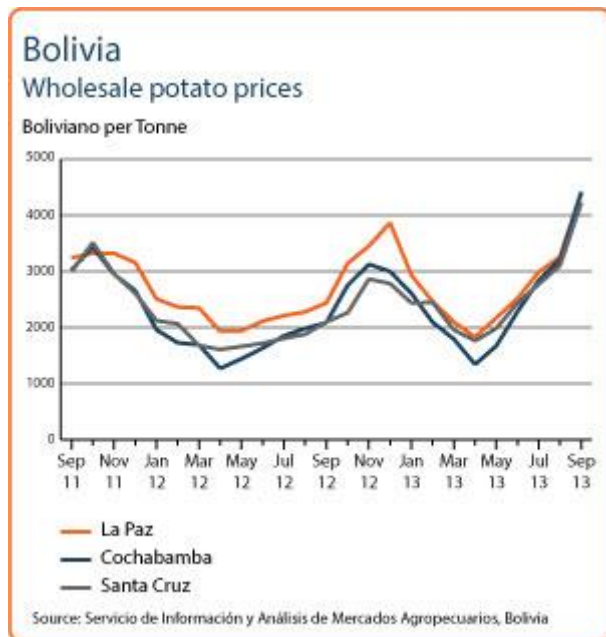
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Rice prices in September were firm at high levels and reflecting this year's low production, in La Paz and Santa Cruz prices were 39 and 34 percent higher than in September 2012. Yellow maize prices declined slightly in most markets but remained almost 55 percent higher than in September 2012 in Santa Cruz.

Adverse weather affects over 80 000 families

According to official estimates, the compounded effect of severe dry weather earlier in March to June followed by frost in July and August, affected more than 80 000 families and 37 000 hectares of different crops and resulted in animal losses in the departments of Santa Cruz, Cochabamba, La Paz, Tarija and Chuquisaca. Cochabamba represents the department with the highest concentration of households affected, estimated at 26 000. The Government is providing humanitarian assistance to the affected population including food, and agricultural inputs including seeds, feed and veterinary drugs.



Reference Date: 09-July-2013

FOOD SECURITY SNAPSHOT

- The 2013 a cereal production reduced by drought
- Cereal imports in 2013/14 marketing season to increase
- Imported wheat prices increased sharply

The 2013 cereal production affected by drought conditions

Production of the recently harvested 2013 main season maize crop was severely reduced by drought. Main affected areas are the key producing area of Santa Cruz and the departments of Tarija, Chuquisaca and Cochabamba. Early forecasts point to a 2013 aggregate output of maize (main and secondary season to be gathered from October) of about 905 000 tonnes, 10 percent lower than last year's and below the average level. Rice output is also anticipated to decline markedly from the bumper crop of 2012. The area planted decreased in response to lower prices, while yields were affected by unfavorable weather throughout the season, including heavy rains from November to January, which delayed plantings, and subsequent dry weather in the main rice producing area of Santa Cruz. Overall, cereal production in 2013 is forecast to decrease by 11 percent from the previous year to about 2 million tonnes.

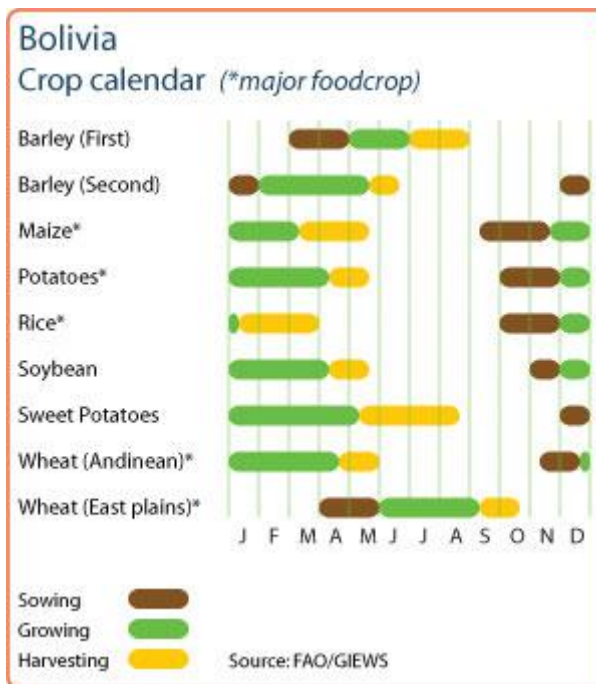
To response to the effects of the drought on production and food security, the Government declared the state of National Emergency on 19 June. It is estimated that 86 450 hectares of various crops and 48 843 livestock heads have been adversely affected by drought. The population in need of assistance totaled 87 500. The drought-affected families will be given food assistance, as well water and feed for animals.

Cereal imports in 2013/14 marketing season to increase

Cereal imports for the 2013/14 marketing season (May/April) are forecast at 499 000 tonnes or almost 10 percent above last year's level. While the bulk of this amount is wheat and wheat flour, the increase is mainly due to higher imports of maize reflecting this year's contraction in production.

Import tariff on non-Argentinian wheat suspended

Following a spike in prices of imported wheat flour in early June, due low supplies from traditional exporter Argentina, the Government has eliminated the import tariff for wheat and wheat flour from other origins for the next six months. The measures aim to reduce the domestic price of flour

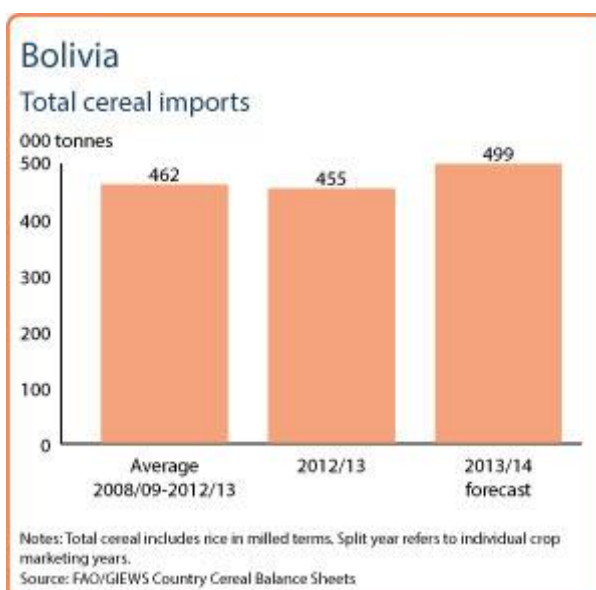


Bolivia

Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	967	1 006	905	-10
Rice (paddy)	458	520	450	-13
Sorghum	398	478	400	-16
Others	311	289	278	-4
Total	2 133	2 293	2 033	-11

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

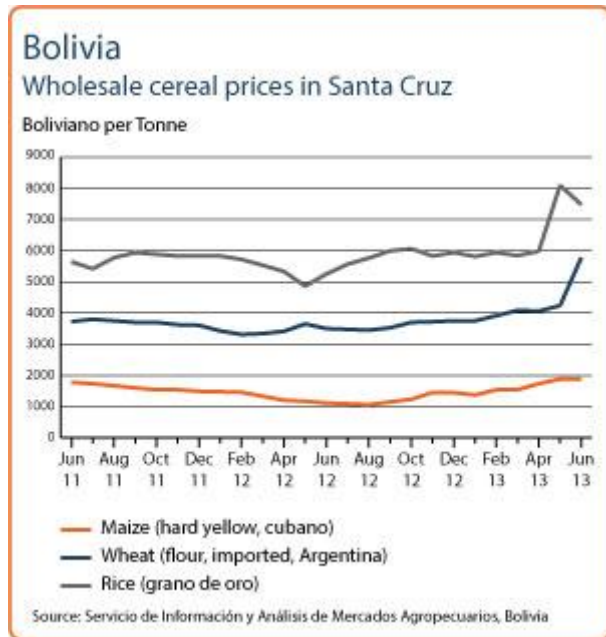


and guarantee supplies.

Imported wheat prices increased sharply, other cereal prices still higher than last year

After declining in the last few months the price of wheat flour—which is mostly imported—rose sharply in June, increasing by 19 and 36 percent in the major cities of La Paz and Santa Cruz, and remained significantly higher than a year ago. However, prices of bread remained stable reflecting the Government's subsidy under agreements with national bakeries.

Rice prices in June weakened from their record levels of May in most markets. However, reflecting this year's low production, in La Paz and Santa Cruz prices were 30 and 41 percent higher than in June 2012. The Government has announced that it will provide support to the rice sector to guarantee supplies of rice in the coming year. Yellow maize prices declined or were stable in most markets in June but remained almost 70 percent higher than at this time last year in Santa Cruz.



Reference Date: 19-June-2013

FOOD SECURITY SNAPSHOT

- The 2013 aggregate cereal production forecast to decrease markedly
- Cereal imports in 2013/14 marketing season to increase
- For six months the Government eliminates import tariff on non-Argentinian wheat
- Imported wheat prices increased sharply, other cereal prices still higher than last year

The 2013 aggregate cereal production forecast to decrease

Production of the recently harvested 2012/13 main season maize crop was severely affected by unseasonable dryness during the vegetative period. Early forecasts point to a 2013 maize aggregate output (main and second season to be gathered from October) of about 900 000 tonnes, 10 percent lower than last year's above average level. Rice output is also anticipated to decline markedly from the bumper crop of 2012. The area planted was reduced in response to lower prices, while yields were affected by unfavorable weather throughout the season, including heavy rains from November to January, which delayed plantings, and subsequent dry weather in the main rice producing area of Santa Cruz. In aggregate cereal production in 2013, is forecast to decrease by 11 percent from the previous year to about 2 million tonnes.

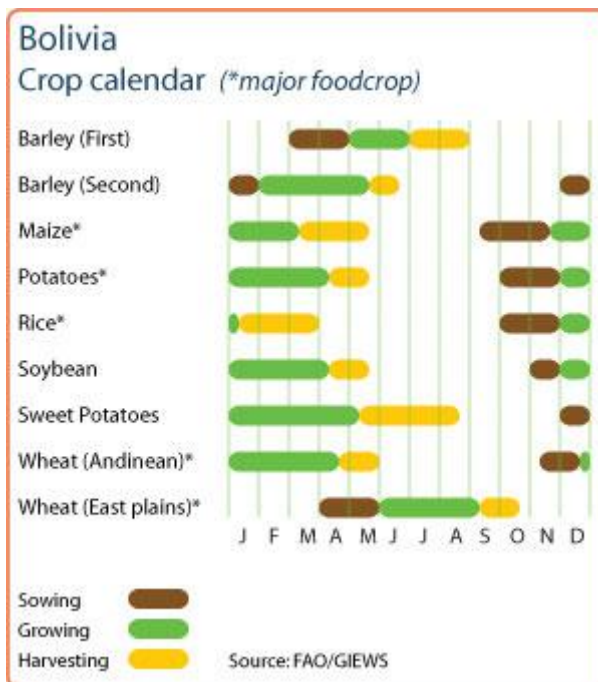
Cereal imports in 2013/14 marketing season to increase

Cereal imports for the 2013/14 marketing season (May/April) are forecast at 499 000 tonnes or almost 10 percent above last year's level. While the bulk of this amount is wheat and wheat flour, the increase is mainly due to higher imports of maize reflecting this year's contraction in production.

For six months the Government eliminates import tariff on non-Argentinian wheat

Following a spike in prices of imported wheat flour in early June, due low supplies from traditional exporter Argentina, the Government has eliminated the import tariff for wheat and wheat flour from other origins for the next six months. The measures aim to reduce the domestic price of flour and guarantee supplies.

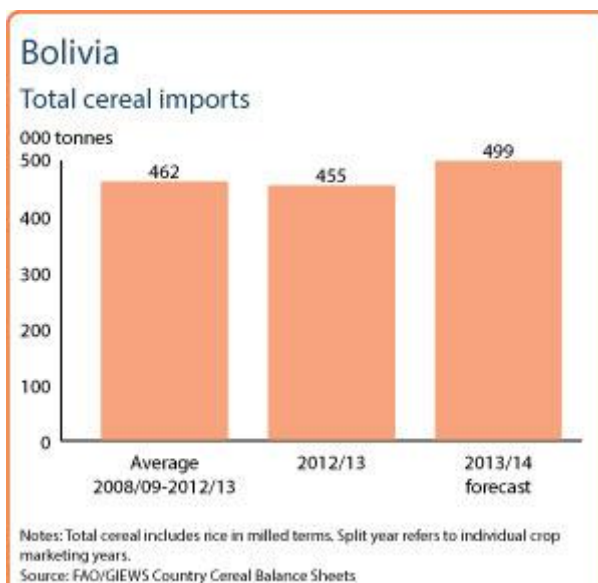
Imported wheat prices increased sharply, other cereal prices still higher than last year



Bolivia
Cereal production

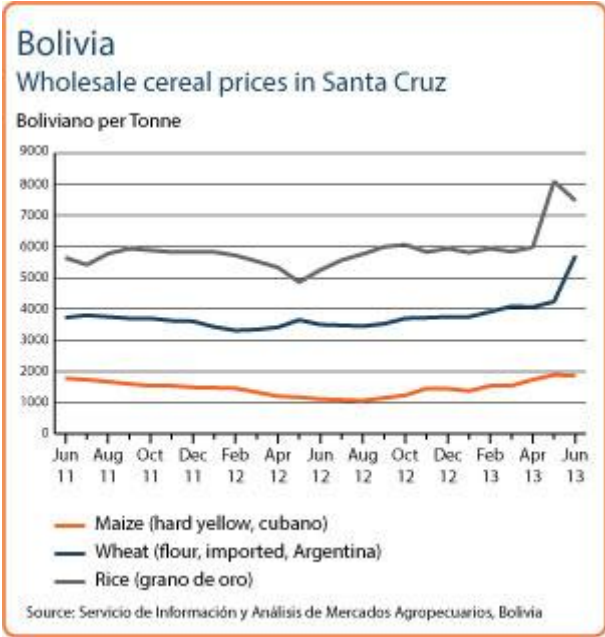
	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Maize	967	1,006	905	-10
Rice (paddy)	458	520	450	-13
Sorghum	398	478	400	-16
Others	311	289	278	-4
Total	2,133	2,293	2,033	-11

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



After declining in the last few months the price of wheat flour—which is mostly imported—rose sharply in the first half of June, increasing by 18 and 34 percent in the major cities of La Paz and Santa Cruz, and remained significantly higher than a year ago. However, prices of bread remained stable reflecting the Governments subsidy under its agreement with national bakeries.

Rice prices in mid-June weakened from their record levels of May in most markets. However, reflecting this year’s low production, in La Paz and Santa Cruz prices were 27 and 42 percent higher than in June 2012. The Government has announced that it will provide support to the rice sector to guarantee supplies of rice in the coming year. Yellow maize prices declined in the first two weeks of June but remained almost 70 percent higher than at this time last year.



Reference Date: 06-July-2012

FOOD SECURITY SNAPSHOT

- The 2012 maize production forecast above average
- Cereal imports in 2012/13 (May/April) to decline
- Maize and rice prices below last year's levels

The 2012 maize production forecast above average

Sowing of the 2012 secondary (winter) season maize, wheat, rice and soybeans crops was delayed by excessive rains in May, particularly in northern parts of the key growing Santa Cruz department. Despite localized crop losses due to the heavy rains, overall prospects for the season remain favourable.

Production of the recently harvested main 2012 summer season cereal crops is estimated to be good. Crops benefited of adequate weather conditions throughout the season (November - May). Official forecast point to a 2012 maize aggregate (main and second season) output of about 1 million tonnes or 4 percent above the good level of 2011. This reflects the favourable weather during the main season and an increase in the planted area. Rice output is estimated at 600 000 tonnes, 3 percent above the high level of 2011. By contrast, the 2012 wheat production is forecast at 209 000 tonnes, or 4 percent less than the reduced level of 2011 mainly as a result of a decrease in plantings in response to the low level of domestic prices.

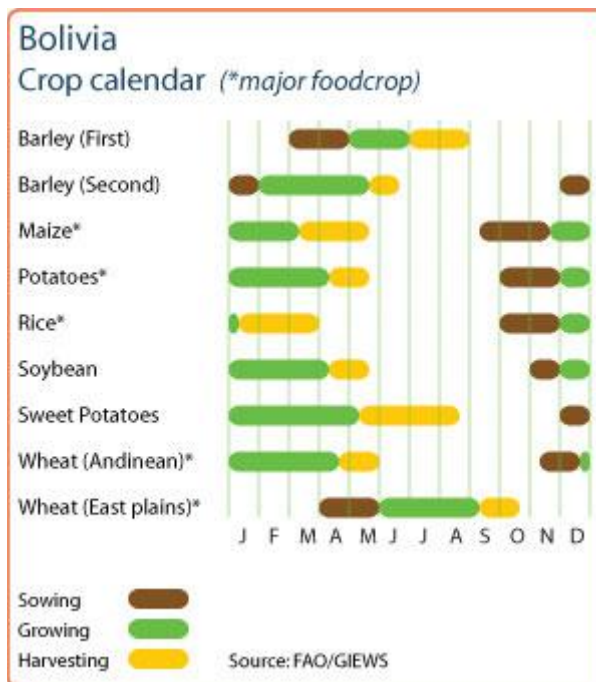
Freezing temperatures in June were recorded in the departments of Cochabamba, La Paz, Oruro, Potosí and Tarija. It is estimated that more than 9 000 families were affected by the cold wave.

Cereal import in 2012/13 marketing season to decline

Cereal imports for the 2012/13 marketing season (May/April) are forecast at 355 000 tonnes or 6 percent below last year's level as a result of the higher output expected in 2012. However, wheat imports are likely to increase owing to the decline forecast in 2012 production.

Maize and rice prices below last year's level

Maize prices have dropped sharply over the last year, reflecting the 2011 good production and the recent harvest of the 2012 main season. In June 2012, maize prices were about 38 percent lower than a year earlier. Prices of wheat flour have remained unvaried in the past months and close to their levels of the previous year. Rice prices increased slightly in June but were still 14 percent lower than in June last year.

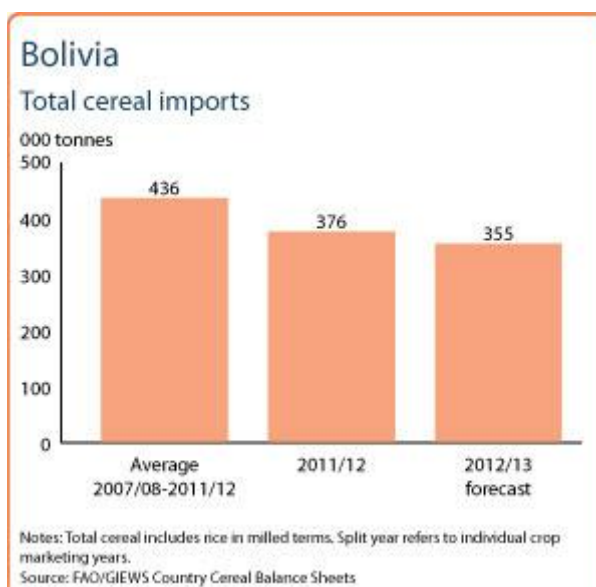


Bolivia

Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	986	966	1 006	4
Rice (paddy)	480	580	600	3
Sorghum	393	409	478	17
Others	310	294	289	-2
Total	2 169	2 249	2 373	6

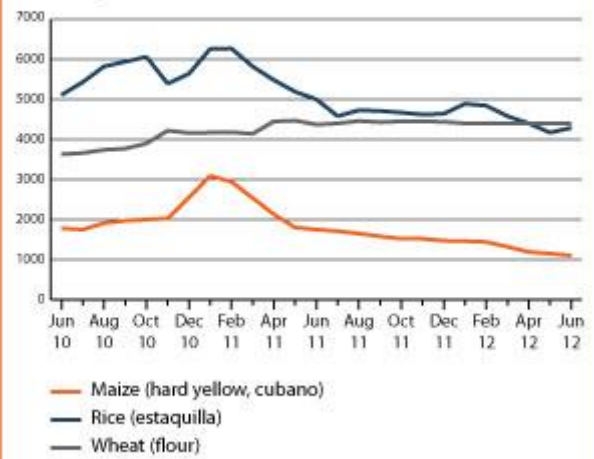
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Bolivia

Wholesale cereal prices in Santa Cruz

Boliviano per Tonne



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Reference Date: 28-February-2012

FOOD SECURITY SNAPSHOT

- Crops affected by drought and heavy rainfall associated with the “la Niña” weather pattern
- Maize and rice output higher in 2011, but wheat production lower
- 2011/12 cereal imports increase
- Maize prices fall, but rice prices increase

Drought delays the main 2012 summer season; January/February rainfall cause crop damage

Sowing of the main 2012 summer season (November to May) should have been completed in December; but it was delayed by the drought that affected several regions of Bolivia in late 2011, and was only completed in late January. The summer season contributes roughly 70 percent of the country's annual maize production, half of its wheat output, and its only rice crop.

Heavy rains in January and February caused flooding in several areas. Official figures show that 9 000 families were affected in the departments of Pando, La Paz, Oruro, Cochabamba, Chuquisaca and Potosí; and the Bolivian government declared a national flood emergency on 22 February. There are no definitive estimates of crop damage yet, but losses are likely to be localized. Above average rainfall is expected to continue until mid-March.

The area sown with rice is expected to decline in 2012, following last year's large harvest and excess supply on the market. Producers have applied to the Government for permission to export their surpluses.

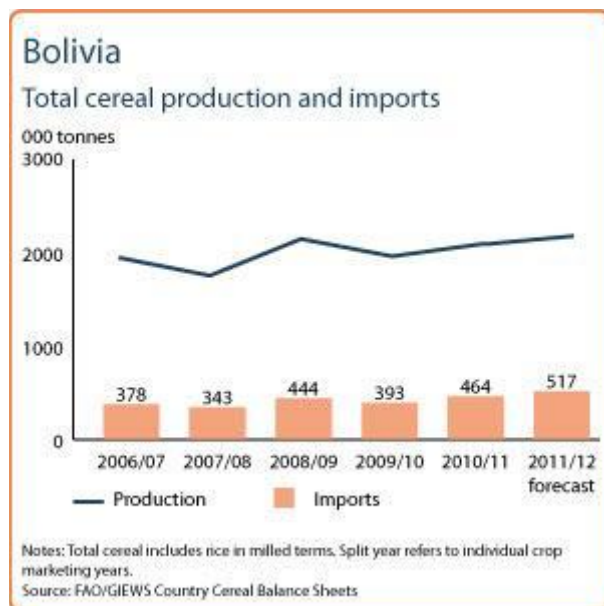
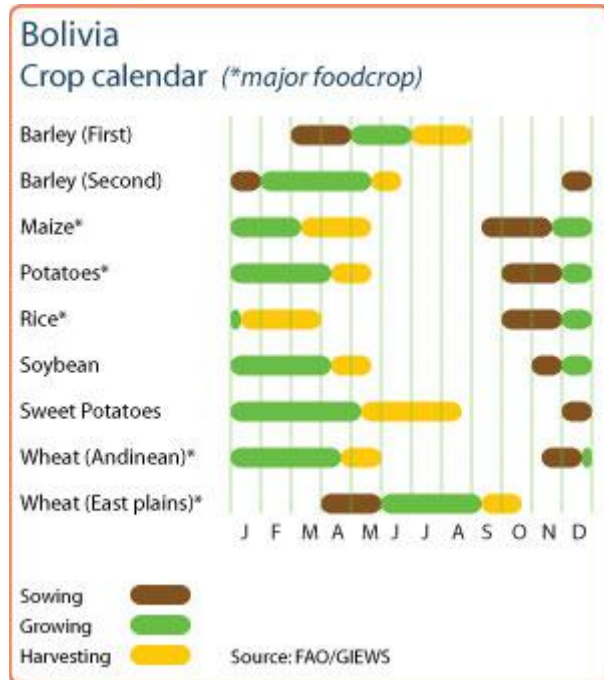
Peasant farm insurance created

In February, the Government set up the Pachamama Universal Agricultural Insurance Program, benefiting 350 000 peasant families, with an investment of 28 million bolivianos (about USD 4 million). Initially, all types of crop will be insured against natural phenomena such as hail storms, frosts, floods and droughts, although not the diseases and pests that occur. In a second phase, an evaluation will be made and the program will be adjusted to provide more general cover.

Larger cereal production in 2011

Cereal production in 2011 is forecast at 2.1 million tonnes, about 5 percent above the 2010 level. A 6 percent increase in the output of maize and paddy rice more than offset a smaller wheat harvest.

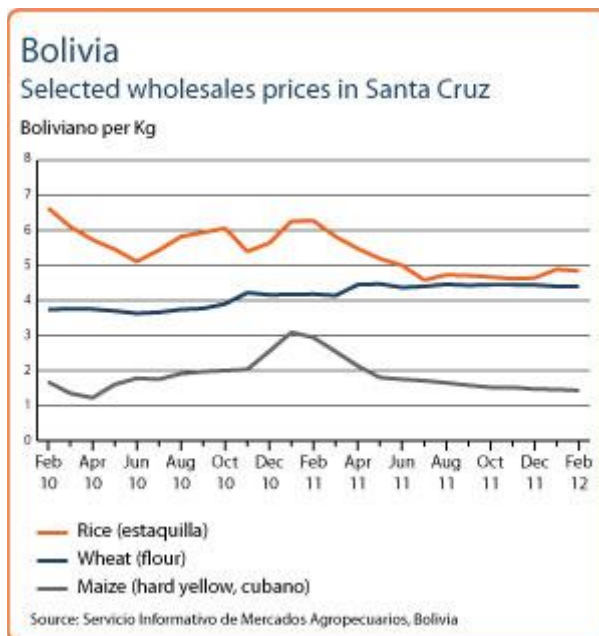
On average, Bolivia imports two thirds of its annual wheat consumption, and imports of this cereal crop are set to



increase in the 2011/12 marketing season (May/April) owing to the reduction in output and a sustained increase in demand.

Maize prices fall, rice prices increase

Maize prices have dropped sharply over the last year, reflecting the good level of production in 2011. In February 2012, they were about 50 percent lower than 12 months earlier. In contrast, rice prices, which had been relatively low and stable in the second half of 2011, edged upwards in the last two months of the year, following the reduction in area sown for 2012.



Reference Date: 20-October-2011

FOOD SECURITY SNAPSHOT

- Lower maize and wheat production in 2011
- Good rice harvest in 2011
- Cereal import requirements will increase in 2011/12
- Cereal prices stable

2011 maize and wheat output hit by the drought

Harvesting of the May-November winter maize and wheat crop is under way, accounting for 30-40 percent of annual maize production and about half of the year's wheat output. The crop was damaged by the drought that has affected the main producing area of Santa Cruz since June, causing a reduction in the area planted and lower crop yields. As a result, aggregate maize production for 2011 (the summer crop harvested in May plus the winter crop) is estimated at around 810 000 tonnes, down by 10 percent on the 2010 volume. Aggregate wheat production (summer and winter crops) is also expected to be lower this year, mainly due to a 40 percent reduction in the area sown for the winter crop.

In contrast, rice production, which is only grown as a summer crop (October-May), is expected to be 12 percent above the previous year's level. Despite flooding in the sowing period in September 2010, and dry weather in the following months, the good level of production this year reflects a larger area planted and normal crop yields.

Total production of cereals in 2011 is expected to be around 2 million tonnes, 4 percent below the 2010 level.

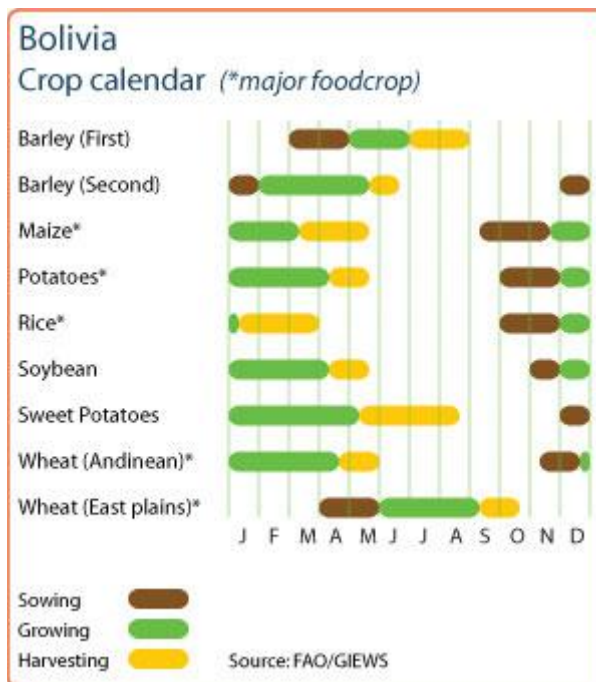
The prolonged drought in several regions of the country is delaying the start of planting activities for the 2012 summer crop, so harvesting is also expected to be delayed.

Cereal imports set to rise

As a result of the decrease in cereal production in 2011, imports of cereals in the 2011-2012 marketing season are forecast to be 10 percent above the previous year's levels - due mainly to larger purchases of wheat and maize to cover this year's shortfall and satisfy growing domestic demand for these grains.

Cereal prices stable

Rice and maize prices, which fell from March to May following the main summer harvest, have remained stable over the last few months, and in October were about 20 percent below their levels of a year earlier. By contrast, wheat flour prices, which Bolivia imports in large quantities, are 14 percent above their 2010 levels.

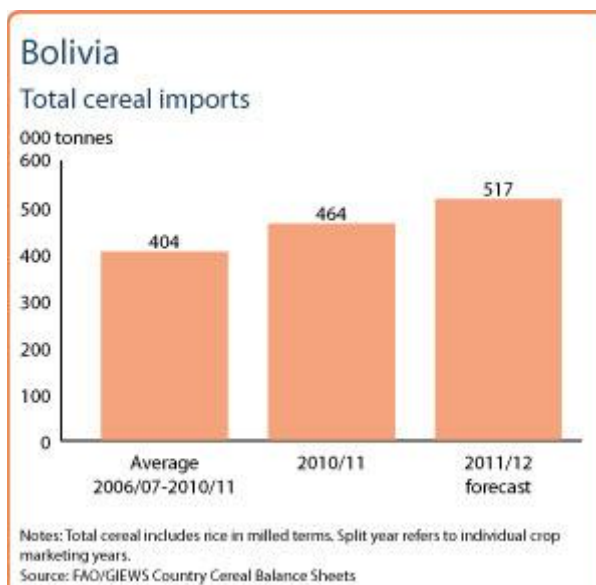


Bolivia

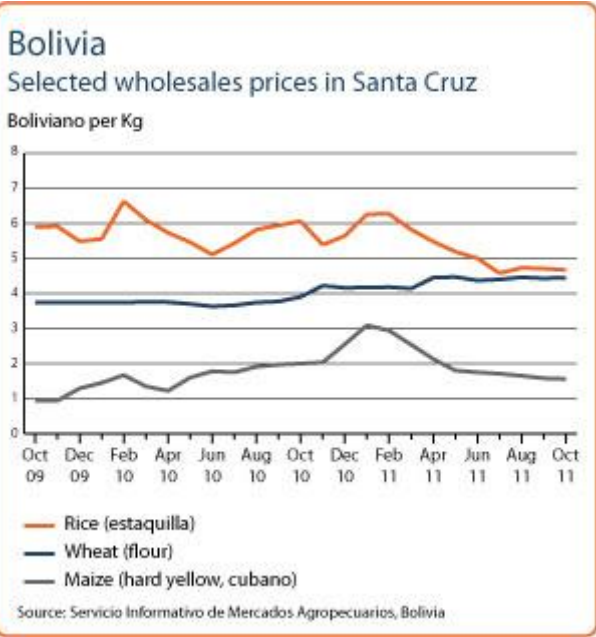
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	876	900	810	-10
Rice (paddy)	471	520	580	12
Sorghum	335	350	333	-5
Others	299	325	287	-12
Total	1 981	2 095	2 010	-4

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



In June 2011, the government approved the Community Agriculture Productive Revolution Law, with the purpose of developing different policies to promote sustainable rural development and food security and sovereignty. This legislation enables the government to set price bands for basic food products in the event of instability on the domestic market.



Reference Date: 30-May-2011

FOOD SECURITY SNAPSHOT

- Good 2011 maize harvest but decrease in rice yield
- 2010 cereal yield higher than in 2009
- Prices of maize and rice decrease but those of wheat flour increase

Increase in cereal yield, excluding rice, predicted for 2011

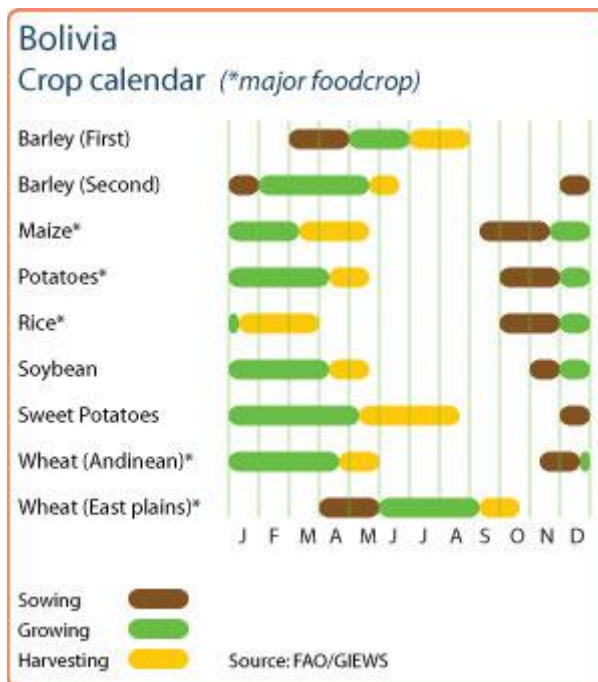
Harvesting of the main cereal crops of 2011 is almost complete. Despite a notable delay in sowing caused by dry weather in the last few months of 2010, the abundant rainfall from mid-January 2011 was generally beneficial for the development of the main maize crops. Early estimates indicate a 4 percent increase in maize production compared to the average for last year, due to higher yields. However, a decrease in rice crops is expected as these were more affected by the dry weather during sowing season and by localized flooding.

2010 cereal yield higher than in 2009

The total production of cereals in 2010 (winter and summer harvests) was estimated at 2.07 million tonnes (rice with husk), 6 percent higher than the 2009 harvest and the average amount. A sharp increase in yields of rice was recorded.

Prices of rice and maize decrease but prices of wheat flour increase

Prices of yellow maize decreased in the last two months in the country's main markets, with the main harvest of 2011. In May, at the Santa Cruz market, maize was valued at 37.5 Boliviano per *arroba* [weight equivalent to 11 502 kg], 5 percent lower than the month before and 4 percent lower than in May last year. In addition, prices of rice have fallen since March with the new harvest and in May were around 5 percent lower than last year. In May, prices of wheat flour, which is largely imported, continued to follow the increasing trend that began halfway through 2010 mirroring the increase on the international markets. In Santa Cruz, wheat flour was valued at 203 Boliviano/45kg, 21 percent higher than in May 2010.



Bolivia
Cereal production

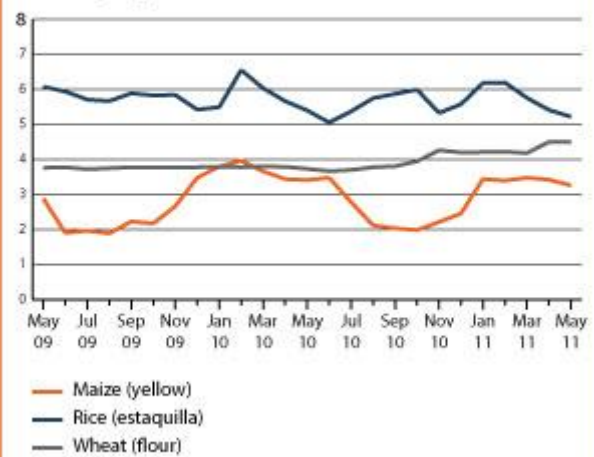
	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Maize	876	900	934	-4
Rice (paddy)	465	500	483	-3
Sorghum	335	350	333	-5
Others	367	382	366	-4
Total	1 975	2 075	2 077	0

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

Bolivia

Selected wholesales prices in Santa Cruz

Boliviano per kg



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Reference Date: 10-February-2011

FOOD SECURITY SNAPSHOT

- 2011 cereal prospects uncertain
- 2010 cereals output will fall below 2009
- Cereals prices have risen in the past few months

Prospects for 2011 cereals are uncertain

The main cereals producing areas of Santa Cruz, Chuquisaca, Cochabamba and Tarija were seriously affected by drought during the last quarter of 2010 and cereals' planting has been delayed. However, from mid January 2011, rainfall has been satisfactory even in some areas as Tarija has been reported flash floods as a result of rising of river levels and also hailstorm that damage crops in early February. Due to climate vagaries the cereals prospects for the 2011 cropping season are uncertain so far.

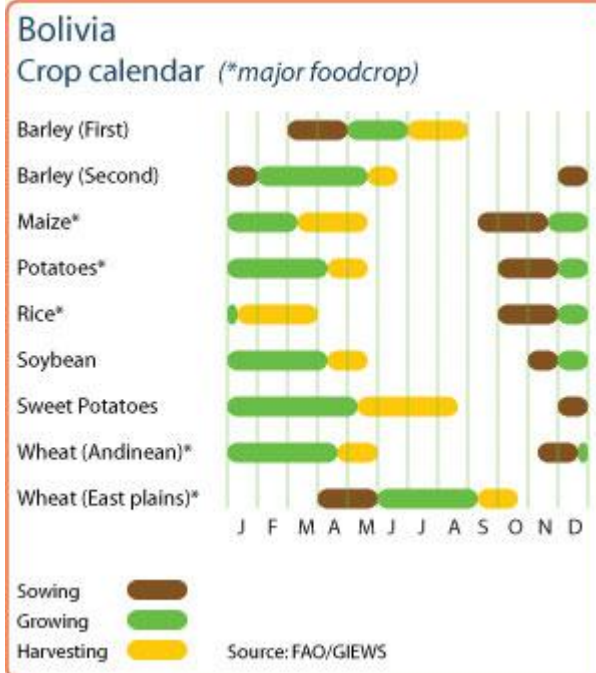
2010 cereals output estimated to be average but below 2009

Total cereals production (winter and summer seasons) should be about 1.745 million tonnes (unhulled rice), 5 percent below the good 2009 levels, but still average. The reduced output is due to the smaller sown acreages, particularly for maize, because of the low prices at sowing time as a result of a government decree (since withdrawn) limiting exports, which increased stocks. Poor rainfall during the agricultural season, particularly in the regions of Chaco and Santa Cruz, reduced crop yields. Rice production fell most steeply, by 13 percent below last year's output.

Cereals prices are rising

The price of wheat flour, which is mostly imported, increase in La Paz 15% compared with January 2010 (one year ago). Rice prices which fell from the beginning of 2010 increase 12 percent from July 2010 to January 2011 however still below 3 percent compared with January 2010 (one year ago).

In Cochabamba and Santa Cruz, yellow maize prices, start rising since August and October 2010 respectively. The high price of yellow maize is pushing up poultry production costs.



Bolivia
Cereal production

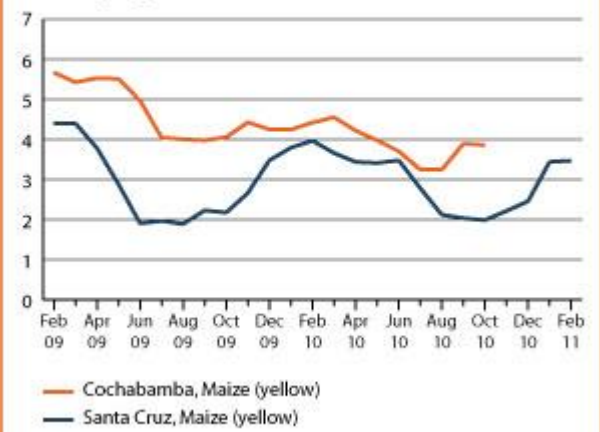
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	800	770	750	-3
Rice (paddy)	470	572	500	-13
Sorghum	229	260	260	0
Others	235	235	235	0
Total	1735	1837	1745	-5

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

Bolivia

Wholesale maize prices

Boliviano per kg

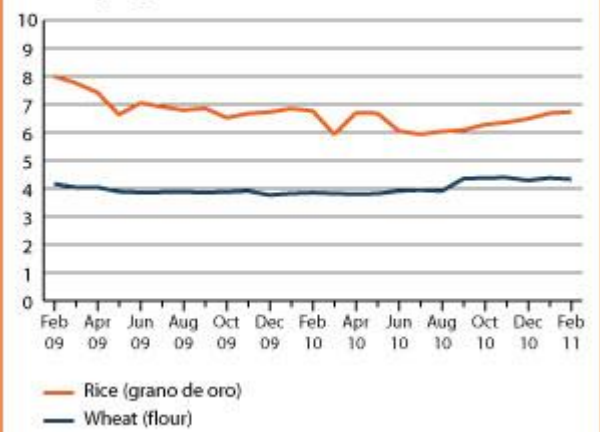


Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Bolivia

Selected wholesale cereal prices in La Paz

Boliviano per kg



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Reference Date: 16-November-2010

FOOD SECURITY SNAPSHOT

- Favourable October rainfall benefited the sowing of cereals for the 2010/11 season
- 2010 cereals output will fall below 2009
- Cereals prices have risen in the past few months

Prospects for the sowing of 2011 cereals are generally favourable

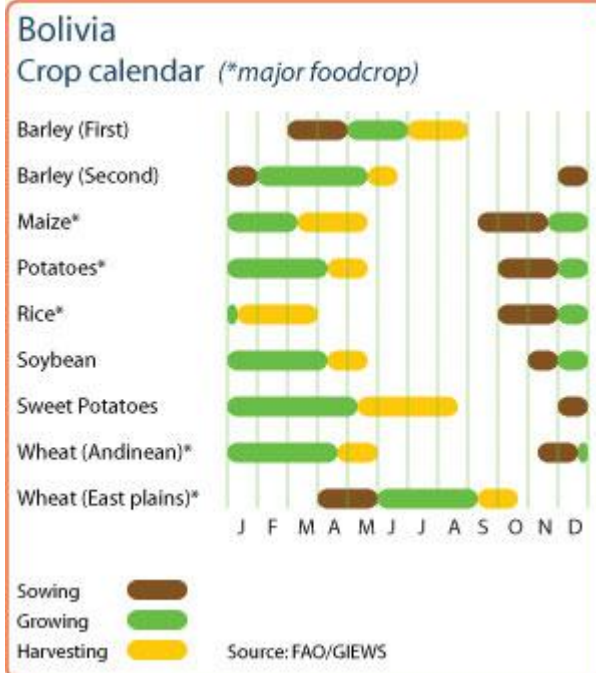
The sowing of cereals for the 2010/11 agricultural season, mainly maize and rice, is in progress. The sowing prospects are favourable following the good rainfall in October, particularly in the main producing zones of the Department of Santa Cruz de la Sierra.

2010 cereals output estimated to be average but below 2009

Total cereals production (winter and summer seasons) should be about 1.745 million tonnes (unhulled rice), 5 percent below the good 2009 levels, but still average. The reduced output is due to the smaller sown acreages, particularly for maize, because of the low prices at sowing time as a result of a government decree (since withdrawn) limiting exports, which increased stocks. Poor rainfall during the agricultural season, particularly in the regions of Chaco and Santa Cruz, reduced crop yields. Rice production fell most steeply, by 13 percent below last year's output.

Cereals prices are rising

The price of wheat flour, which is mostly imported, rose steeply during September because of the sharp increase in international prices. Wheat flour was sold on the La Paz market in mid-November 2010 at BOB 198/pound, 13 percent above the August price. In Santa Cruz, Cuban yellow maize prices, which had been rising since June this year, stabilized at record levels in October and at the beginning of November. The high price of yellow maize is pushing up poultry production costs. Rice prices, which fell or remained stable from the beginning of the year, rose slightly in the last quarter.



Bolivia
Cereal production

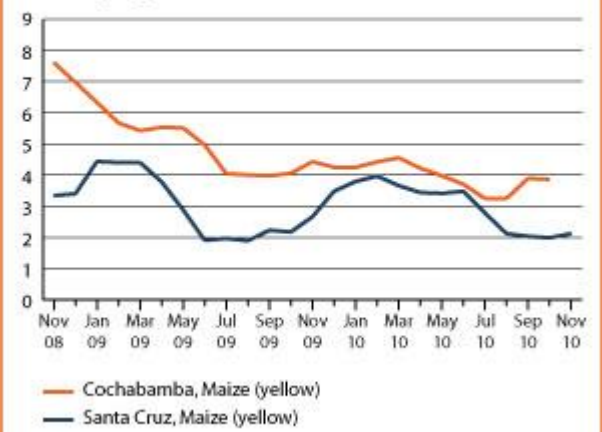
	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	800	770	750	-3
Rice (paddy)	470	572	500	-13
Sorghum	229	260	260	0
Others	235	235	235	0
Total	1735	1837	1745	-5

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

Bolivia

Wholesale maize prices

Boliviano per kg

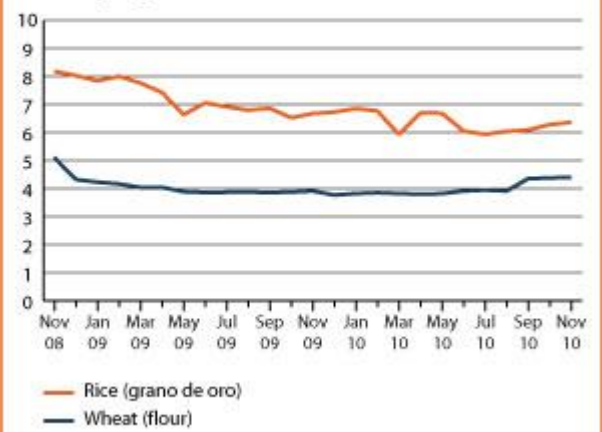


Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Bolivia

Selected wholesale cereal prices in La Paz

Boliviano per kg



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Reference Date: 21-June-2010

FOOD SECURITY SNAPSHOT

- Drought conditions affecting the oriental planes and the Chaco region
- Maize production in 2010 is estimated at a below average level
- Price of yellow maize in Santa Cruz has shown a slight decrease in recent months

Rainfall deficits are recorded in the Oriental planes of Santa Cruz and the Chaco region

In May, rainfall was generally abundant and well distributed in the North of La Paz and Pando departments. However, rainfall deficits were recorded in most of the Andean plateau, the Valle region and in the oriental planes of Santa Cruz and Beni departments as well in the region of the Bolivian Chaco, where a state of emergency has been declared by the authorities. In the last few years water scarcity has become a chronic problem, especially in the southern dry land of Bolivia. A recent evaluation report by the Ministry of Agricultural and Rural Development indicated that, from October 2009 to 1 May 2010, drought affected up to 80 municipalities and approximately 34 000 families from seven departments, namely Santa Cruz, La Paz, Cochabamba, Chuquisaca, Tarija, Oruro and Potosi.

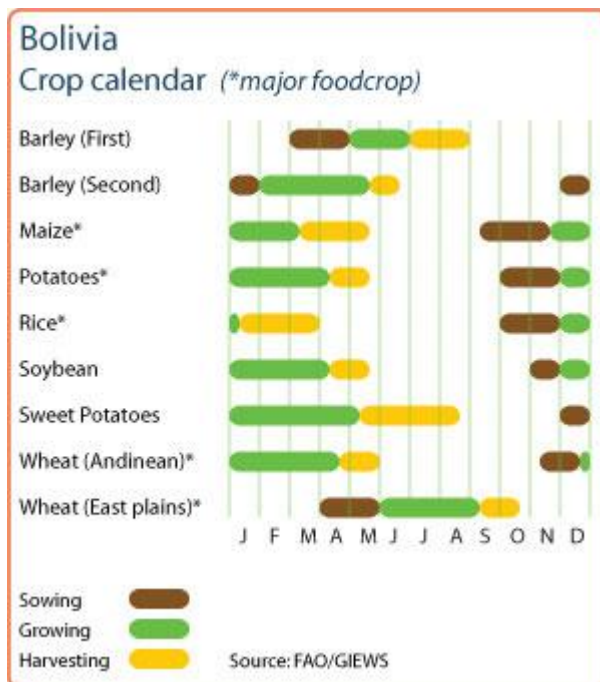
Harvesting of the 2010 maize crop is almost complete and a decline in production is forecast following drought conditions and low prices at planting

Harvesting of the summer maize crop is virtually complete. Maize production in Santa Cruz, the country's main producing area, is expected to drop significantly according to the National Association of Producers of maize, sorghum, beans and alternative crops (Promasor). A decrease in planted area was registered following a government decree, which has been recently lifted, that imposed restrictions on maize exports and has led to an oversupply and low prices of the cereal at the beginning of the planting season. The drought conditions in the Chaco region of Santa Cruz, further deteriorated crop conditions and negatively affected yields.

Yellow maize prices show a slight decline from their peak in February 2010

Yellow maize prices in Santa Cruz have eased in the last four months following a sustained increase from last November. In June 2010, prices have shown a 12 percent decline compared to their peak levels in February 2009. At the beginning of June, the Government established a zero-tariff import for 60 000 tonnes of yellow maize, which will be in force until next September in order to cover for the deficit in the supply of yellow maize mainly used in the production of poultry, swine and dairy products.

In contrast, wholesale prices of wheat flour in La Paz have shown a stable pattern since the beginning of 2009 and current quotations are more than 40 percent below their peak level of 2008.



Bolivia
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	800	770	750	-3
Rice (paddy)	470	572	500	-13
Sorghum	229	260	260	0
Others	235	235	235	0
Total	1735	1837	1745	-5

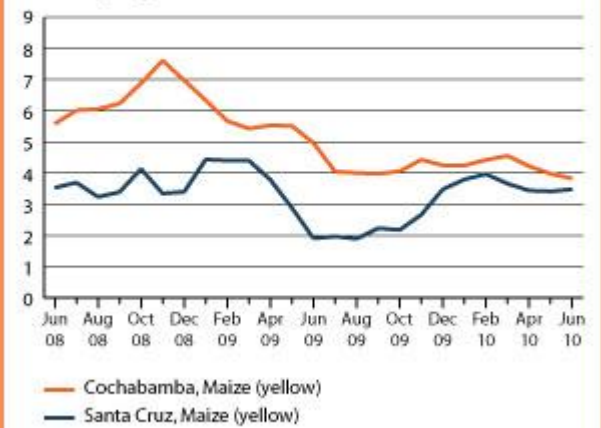
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Rice prices, which had been declining in the first quarter of 2010, rose again in April and May. However, the first two weeks of June have shown a slight drop.

Bolivia

Wholesale maize prices

Boliviano per kg



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Bolivia

Selected wholesale cereal prices in La Paz

Boliviano per kg



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Reference Date: 06-April-2010

FOOD SECURITY SNAPSHOT

- Heavy precipitation are causing floods and damages in western departments and Oriental lowlands
- Satellite images indicate good growing conditions of crops in major farming areas
- High yellow maize prices affect performance of poultry sector

Heavy rainfall affect mainly Oriental lowlands and La Paz department

Since the beginning of the rainy season in November, heavy precipitations in the highlands have caused flooding in western departments and in Oriental lowlands. Due to persistent rainfall during the last two months, a red alert was declared in the departments of Cochabamba, Santa Cruz, Beni and La Paz. Official sources from the Vice-Ministry of Civil Defence have released preliminary figures which point to a total number of 45 000 affected people.

Rice and maize planting operations delayed by heavy precipitation

Planting of the 2010 rice cropping season was completed in February with some delay due to heavy rainfall that hampered sowing operations. In addition, approximately 5 percent of the total planted area was lost and re-sowing operations were needed.

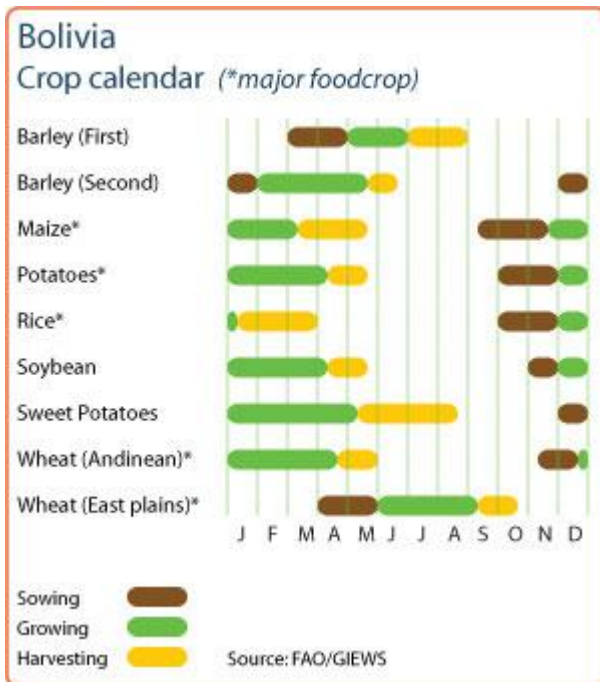
Harvesting of summer maize crop is underway. Despite some localized losses due to the heavy precipitation of recent weeks, satellite images covering the major cropping departments of Santa Cruz, Cochabamba, Chuquisaca and Tarija indicate a normal vegetation activity which could translate into good average yields.

In Santa Cruz yellow maize price is almost back to record level of 2009

Since November 2009, yellow maize prices have been constantly increasing, especially in the major market of Santa Cruz, where they are currently only 15 percent lower than the record level of January 2008. The high price of yellow maize is increasing production costs of poultry meat. On the 24th February 2010, temporary bans on maize and sorghum export were set by the Bolivian government with the intent to guarantee domestic supply and to lower prices.

On the contrary, wholesale prices of wheat flour in the market of La Paz are showing a stable pattern since the beginning of 2009 and current quotations are more than 40 percent below the peak level of 2008. The good performance of the 2009 wheat production as well as governmental interventions, such as the lifting of import bans on wheat flour, have helped maintaining a constant price level. However, the country is still highly dependent on wheat imports which, for marketing year 2009/10, are forecast at average 390 000 tonnes.

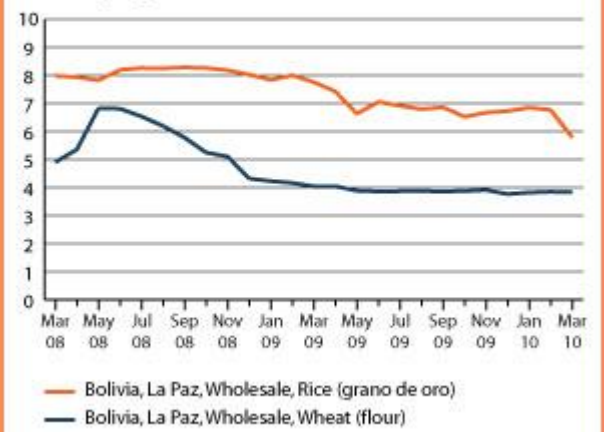
Rice prices have been declining during the last quarter and are currently 27 percent below prices of March 2008.



Bolivia

Selected cereal prices

Boliviano per kg



Source: Servicio Informativo de Mercados Agropecuarios, Bolivia

Reference Date: 7-October-2009

FOOD SECURITY SNAPSHOT

- Drought conditions are affecting southern farming areas and the Andean plateau
- Wheat harvesting completed with a forecast production of 125 000 tonnes
- Rice prices still well above the level recorded in 2008

El Niño is causing drought conditions and heavy rains

The presence of El Niño is currently causing heavy rains in the eastern fertile plains of the country, leaving most of the Andean plateau and southern departments dry. In August, the departments of Beni and Pando and the north of Santa Cruz were affected by severe dry weather conditions. At the beginning of September, various farming municipalities of the Chaco area, which includes the departments of Chuquisaca, Tarija and Santa Cruz, required emergency assistance for water supply for cattle and agriculture. However, damages to major staple food, such as maize and rice, are likely to be limited because harvesting operations in this area are already well advanced.

Harvesting of second season crops is completed

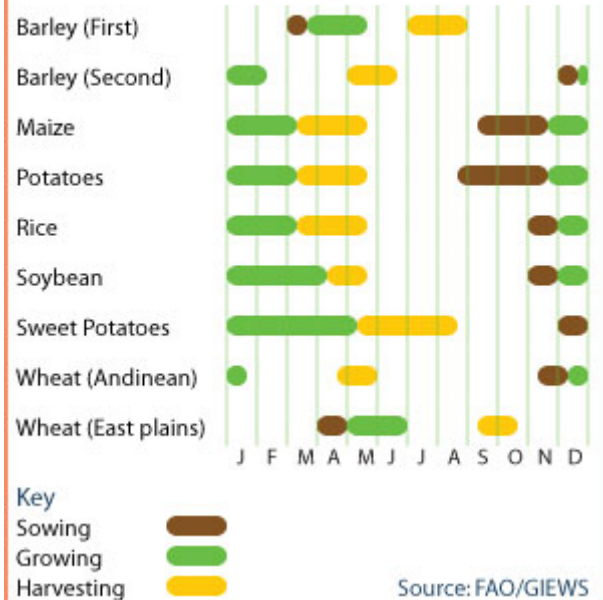
Harvesting of 2009 second season (winter) cereal crops, which contributes 10 percent to the national annual production, is virtually completed. Total production of wheat in 2009 is forecast at 125 000 tonnes, well above last years' output affected by unfavourable weather conditions.

Additionally, 2009 maize crop production is estimated at about 800 000 tonnes, well above last year's result.

Planting of summer coarse grains and paddy just started

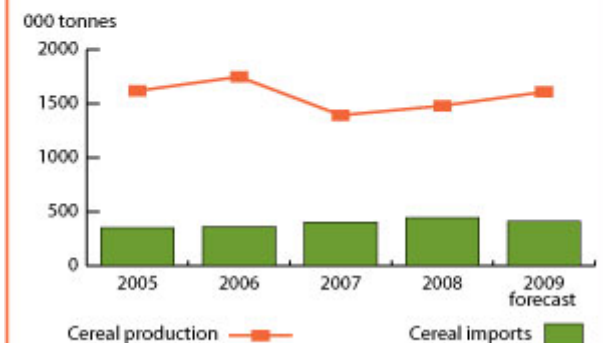
Land is being prepared for the planting of 2009/10 first season (summer) coarse grains, essentially maize, that will be harvested from next March. Planting of 2009/10 paddy crop has just started in tropical areas of the Eastern lowlands of Santa Cruz department, while planting of the important winter potato crop has started in the highland valleys.

Crop calendar Bolivia



Cereal production and imports Bolivia

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Maize	762	750	800	6.7%
Rice (milled)	282	261	314	20.3%
Sorghum	210	240	260	8.3%
Other	228	230	235	2.2%
Total Cereals	1486	1481	1609	8.6%



Source: FAO/GIEWS Country Cereal Balance Sheets

Rice prices still 30 percent above 2007 level

Wholesale prices of wheat flour in the La Paz market are back to the level of two years ago. The continuing intervention of the Empresa de Apoyo a la Producción de Alimentos (EMAPA), as the major buyer of the market, has helped to maintain a constant price level.

By contrast, the rice grano de oro, the main staple food in urban areas, despite the downward trend recorded since mid 2008, is still almost 30 percent higher than the level of 2007.

