Food and Agriculture Organization of the United Nations

GIEWS Country Brief
The United Mexican States

Reference Date: 26-September-2023

FOOD SECURITY SNAPSHOT

- **Dry weather conditions contributed to below-average plantings of 2023 main maize crop**
- **Cereal import requirements in 2023/24 marketing year forecast slightly above average**
- **Prices of white maize sharply decreased in July**

Dry weather conditions contributed to below-average plantings of 2023 main maize crop

The 2023 main season maize crop, to be harvested from mid-October, is currently at flowering and grain filling stages. According to official estimates, the area sown up to end-August was 5 percent below the average, as a result of low precipitation amounts between May and mid-July. According to satellite imagery, below-average crop conditions were observed in key producing central areas (NDVI map). Yield prospects remain uncertain on account of mixed weather forecasts. Above-average rainfall amounts are forecast in the centralwestern region in the October to December period, while average to below-average precipitation is expected in the centralsouthern region.

Production of the 2023 minor season maize crop, harvested in the May to July period, is officially estimated at 8.9 million tonnes, 10 percent above the average, due to excellent yields.

The planting of the 2023 minor season sorghum crop was completed in mid-September. Planted area as of end-August is officially estimated to be more than 15 percent below average, owing to dry weather conditions. However, the 2023 aggregate sorghum production is preliminarily forecast to be near average, mostly due to the above-average main season output attained during the second quarter of 2023, on account of large sowings and above-average yields.

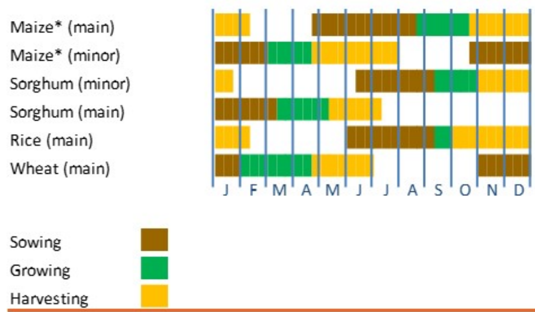
Planting of the minor season wheat crop, which accounts only for about 5 percent of the annual production, is ongoing. The 2023 aggregate wheat production is anticipated at an above-average level of 3.46 million tonnes, reflecting the bumper main season harvest gathered in the April to June period.

Cereal import requirements in 2023/24 marketing year forecast slightly above average

Cereal import requirements in the 2023/24 marketing year

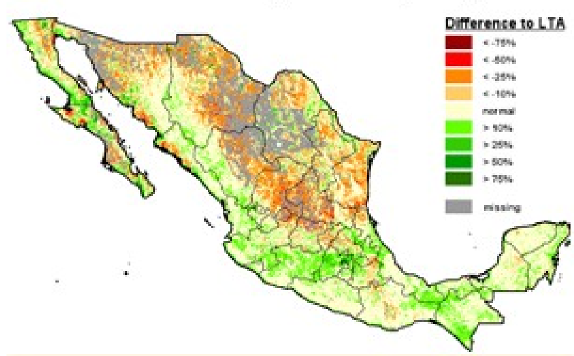
Mexico

Crop Calendar *(*major foodcrop)*



Mexico - NDVI anomaly

Relative difference to Long Term Average - August 2023



Mexico

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Maize	27 176	26 553	26 905	1.3
Sorghum	4 544	4 763	4 550	-4.5
Wheat	3 212	3 611	3 460	-4.2
Others	1 335	1 349	1 106	-18.0
Total	36 267	36 276	36 021	-0.7

Note: Percentage change calculated from unrounded data.

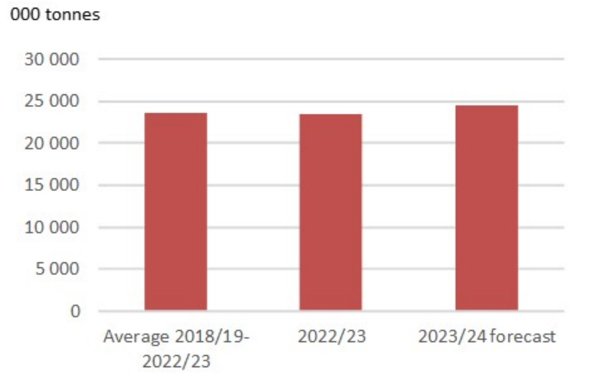
(October/September) are forecast at 24.4 million tonnes, slightly above the five-year average. This is supported by increasing demand for yellow maize by the domestic feed industry.

Prices of white maize sharply decreased in July

Prices of white maize declined sharply in July 2023, as the above-average minor season harvest improved market supplies. Then, prices stabilized in August and they were more than 10 percent below their year-earlier levels. Prices of black beans were mostly stable during the first eight months of 2023, but at higher year-on-year levels, reflecting reduced domestic outputs during the previous two seasons. Prices of rice have been declining since late 2022 due to larger year-on-year imports between September 2022 and May 2023. Additional downward pressure on rice prices was provided by the recent weakening of export prices of the United States of America, the major rice supplier to the country.

Mexico

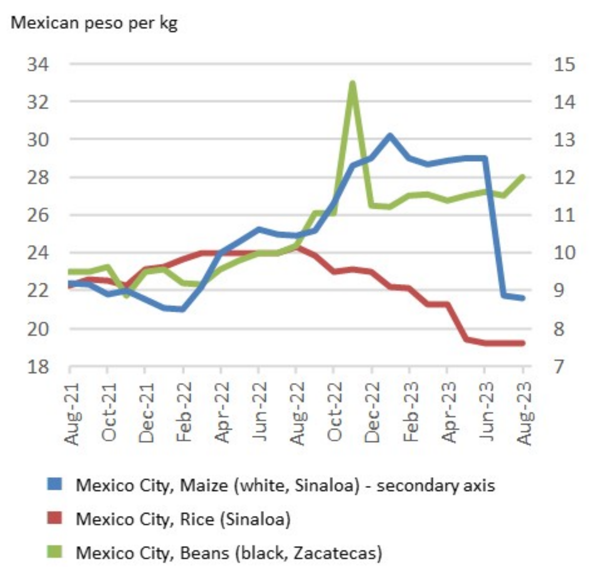
Cereals Imports



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

Mexico

Wholesale prices of selected cereals



This brief was prepared using the following data/tools:
FAO/GIEWS Country Cereal Balance Sheet (CCBS) https://www.fao.org/giews/data-tools/en/.
FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool https://fpma.fao.org/.
FAO/GIEWS Earth Observation for Crop Monitoring https://www.fao.org/giews/earthobservation/.
Integrated Food Security Phase Classification (IPC) https://www.ipcinfo.org/.

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 23-December-2022

FOOD SECURITY SNAPSHOT

- **Cereal output in 2022 forecast at average level**
- **Expected dry weather conditions in first quarter of 2023 may curtail yield prospects**
- **Cereal import requirements in 2022/23 marketing year forecast slightly above average**
- **Prices of white maize and black beans higher year-on-year in November 2022**

Cereal output in 2022 forecast at average level

Harvesting of the 2022 main season maize crop is ongoing. The seasonal output is forecast at a near-average level, as the contraction in sowings due to dryness was offset by above-average yields, supported by improved rainfall amounts in August and September. The 2022 maize production, including the below-average minor season output harvested between April and July, is anticipated at a slightly below-average level of 26.5 million tonnes.

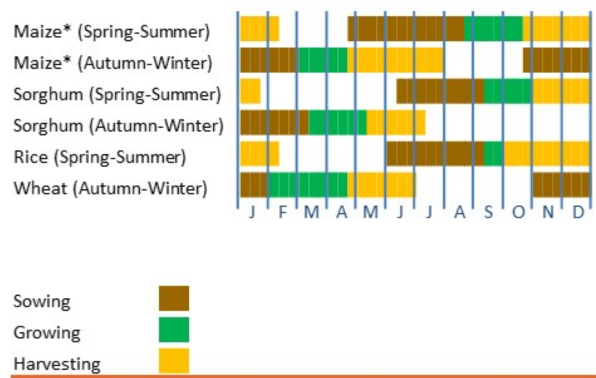
The 2022 aggregate cereal production is forecast at an average level of 36.7 million tonnes, including the above-average harvests of sorghum and wheat crops, driven by excellent yields. The wheat planted area was slightly above the average and the largest since 2018, as high wheat prices at planting time instigated farmers to expand sowings.

Expected dry weather conditions in first quarter of 2023 may curtail yield prospects

Planting operations of the 2023 main wheat and minor maize crops are underway. In the key producing northwestern region, where crops are grown predominantly under irrigation, abundant rains in August and September secured an adequate availability of irrigation water. Official forecasts point to plantings of the 2023 main wheat crop at an above-average level and minor maize crop at near-average levels. However, below-average precipitation amounts are forecast in the 2023 January to March period, with likely negative effects on crops at vegetative and flowering stages.

Mexico

Crop Calendar *(*major foodcrop)*



Source: FAO/GIEWS.

Mexico

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percentage
Maize	27 418	27 503	26 500	-3.6
Sorghum	4 562	4 370	5 260	20.4
Wheat	3 191	3 284	3 600	9.6
Others	1 339	1 403	1 360	-3.1
Total	36 509	36 559	36 720	0.4

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

Cereal import requirements in 2022/23 marketing year forecast slightly above average

Cereal import requirements in the 2022/23 marketing year (October/September) are forecast at 23.9 million tonnes, slightly above the five-year average. The increasing demand for yellow maize by the domestic feed industry steadily supported cereal imports since 2012, making the country the world's second largest maize importer in the 2021/22 marketing year.

Prices of white maize and black beans higher year-on-year in November 2022

Prices of white maize rose in October and November, as the ongoing harvest has not yet improved market supplies. High production and transportation costs also provided upward pressure. Prices in November were more than 35 percent above year-earlier levels in the capital, Mexico City, following sharp increases in the second quarter of the year in line with rising prices in the international market. Similarly, prices of black beans increased substantially in November, reflecting expectations on a below-average main harvest and reaching levels 50 percent higher year-on-year. By contrast, prices of rice declined between September and November, on account of larger year-on-year imports in the third quarter of 2022 and were near their value a year ago.

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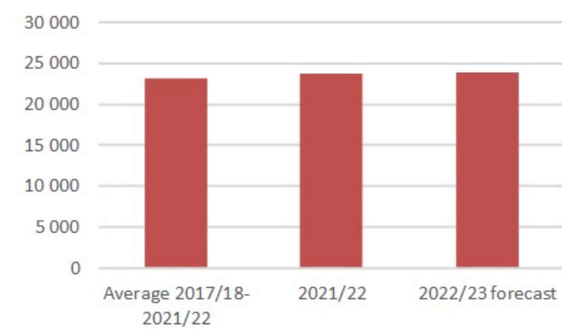
Mexico

Cereals Imports

000 tonnes

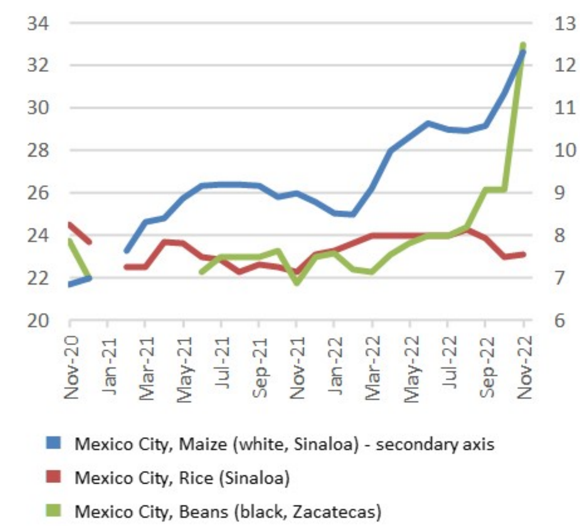


Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Mexico

Wholesale prices of selected cereals

Mexican peso per kg



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

Food and Agriculture Organization of the United Nations

GIEWS Country Brief

Mexico

Reference Date: 08-April-2022

FOOD SECURITY SNAPSHOT

- **Planted area to 2022 main wheat crop estimated slightly above-average level**
- **Cereal production in 2021 officially estimated to be near average**
- **Cereal import requirements in 2021/22 marketing year forecast slightly above average**
- **Prices of white maize well above year-earlier levels**

Planted area to 2022 main wheat crop estimated slightly above-average level

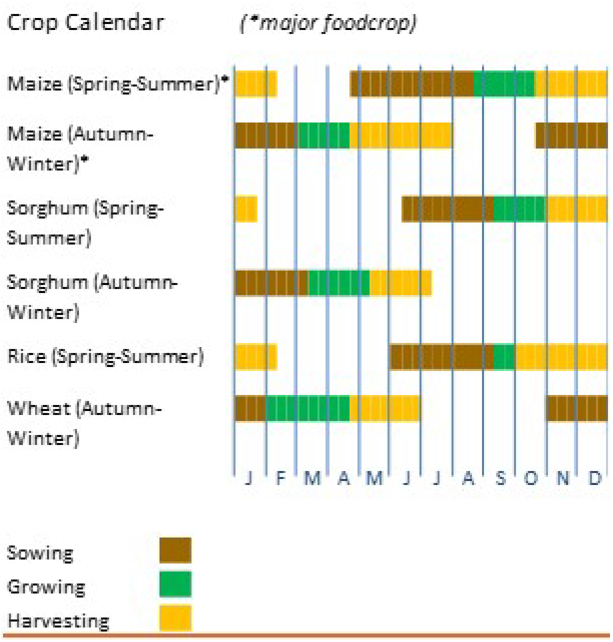
The 2022 main season wheat crop is currently at flowering and grain filling stages, and shows favourable vegetation conditions in most producing areas. Planted area is officially estimated to be slight above the average, which represents a rebound from the low levels of the previous two years. The expansion of sowings is mainly driven by the high prices of the grain and it is most pronounced in the key producing State of Sonora, with a year-on-year increase greater than 20 percent. The coverage of the government's guaranteed minimum price programme was expanded in December 2021 to include small holder farmers (up to 8 hectares per producer) from the current cropping season, which also supported acreage gains. The 2022 main season output, which accounts for 95 percent of the annual wheat production, is preliminarily forecast at an above-average level.

The 2022 minor season maize crop, to be harvested from April, is under generally good conditions. Production is anticipated at a below-average level due to a contraction in planted area, which is officially estimated to be about 10 percent below the previous five-year average. Despite the high prices of maize and the implementation of the minimum price programme for small and medium-size producers, high production costs induced farmers to reduce sowings.

Cereal production in 2021 officially estimated to be near average

With the harvest of the 2021 main season maize crop completed last January, the 2021 aggregate output of maize (27.5 million tonnes) and wheat (3.3 million tonnes) is officially estimated at a near-average level. Sorghum production in 2021 was estimated at 4.3 million tonnes, about 8 percent below the average, as the main season crop was affected by poor rains in the key producing Tamaulipas State.

Mexico



Mexico

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	27 567	27 425	27 476	0.2
Sorghum	4 689	4 704	4 302	-8.5
Wheat	3 307	2 987	3 282	9.9
Others	1 319	1 227	1 448	18.0
Total	36 882	36 341	36 507	0.5

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

Cereal import requirements in 2021/22 marketing year forecast slightly above average

Cereal import requirements in the 2021/22 marketing year (October/September) are forecast at 24.5 million tonnes, slightly above the average. The increasing demand for yellow maize by the domestic feed industry steadily supported cereal imports since 2012, making the country the world's second largest maize importer in the 2020/21 marketing year.

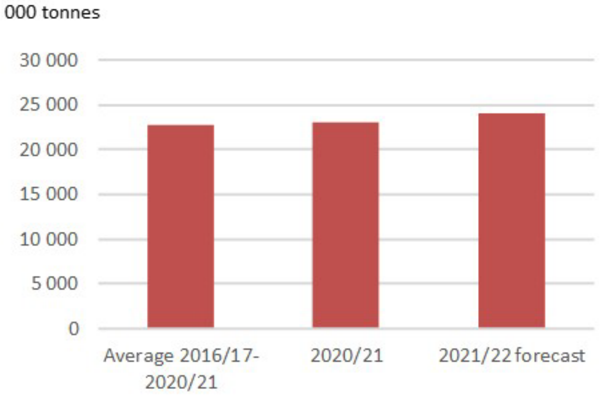
Prices of white maize well above year-earlier levels

Following seasonal declines between December 2021 and February 2022, prices rose in March due to high production and transportation costs and were 25 percent higher year on year.

Reflecting the high prices of maize, prices of staple tortilla in most retail markets were also well above their year-earlier levels. In March 2022, prices of black beans were also higher than their values in the same month in 2021, despite a bumper main season harvest, completed in late 2021. Prices of rice have been increasing since December 2021 and, as of March 2022, they were slightly lower than a year earlier, mainly reflecting higher year-on-year imports in the November 2021 to February 2022 period.

Mexico

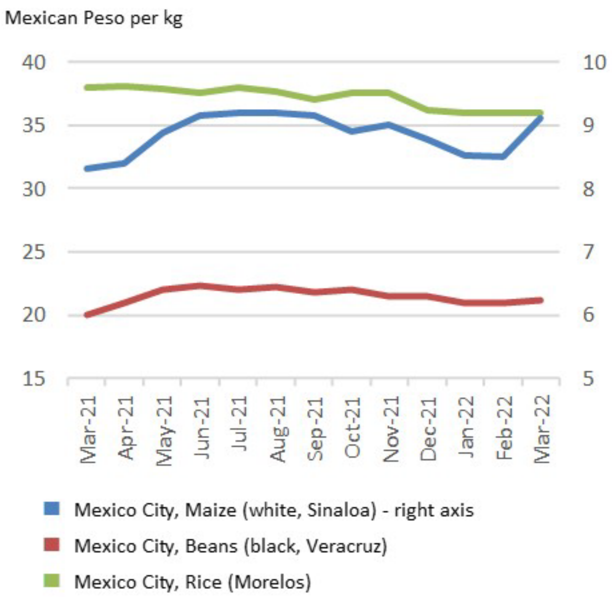
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals



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

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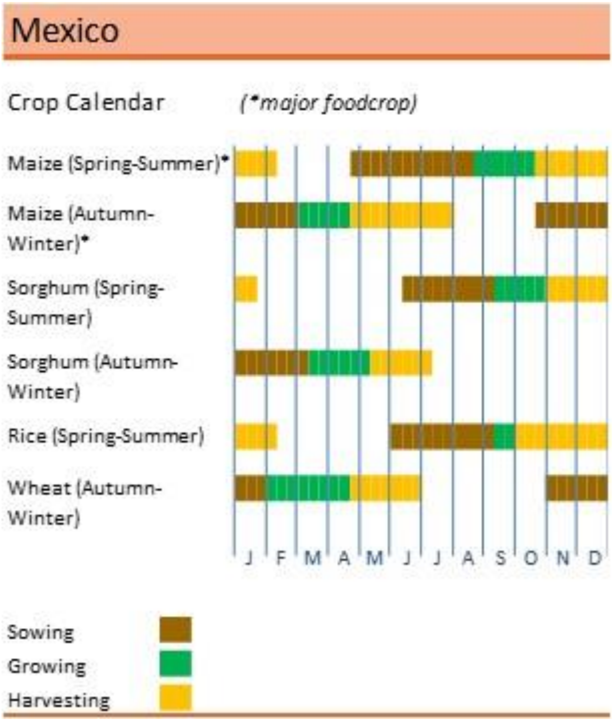
GIEWS Country Brief
Mexico

Reference Date: 20-July-2021



FOOD SECURITY SNAPSHOT

- **Favourable production prospects for 2021 main season maize crop**
- **Cereal import requirements in 2020/21 marketing year forecast near average**
- **Prices of white maize on steady rise in 2021**
- **Concerns over impact of COVID-19 pandemic on food security**

Favourable production prospects for 2021 main season maize crop

Planting operations of the 2021 main season maize crop are ongoing under favourable weather conditions. According to satellite imageries, vegetation conditions of establishing crops are above the average in the key producing states of México, Puebla and Veracruz. Rainfall amounts are forecast at average levels in the August-October period, likely favouring crops at flowering and grain filling stages. The planted area is anticipated at a near-average level as elevated production costs constrained farmers' early intentions to expand sowings as a response to the high prices of the grain. The 2021 aggregate maize production, including a slightly below-average minor season output harvested in the April-June period, is forecast at an average level of 27 million tonnes.

Harvesting of the 2021 main season sorghum crop is still ongoing as it started with a one-month delay following poor early season rains in the key producing Tamaulipas State that caused crop losses and required replanting. The main season output is anticipated at a below-average level, reflecting the reduced harvested area. Planting of the minor season sorghum crop is underway amid overall adequate soil moisture levels.

Harvesting of the 2021 main season wheat crop is nearing completion. Production is estimated below the previous five-year average due to a low level of plantings as farmers preferred to plant more profitable maize crop.

Mexico

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	27 572	27 450	27 070	-1.4
Sorghum	4 701	4 762	4 265	-10.4
Wheat	3 302	2 965	3 100	4.6
Others	1 319	1 225	1 359	10.9
Total	36 894	36 402	35 794	-1.7

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

Cereal import requirements in 2020/21 marketing year anticipated near average

Cereal import requirements in the 2020/21 marketing year (October/September) are anticipated at a near-average level of 22.1 million tonnes. Following steady increases between 2012 and 2019, import needs are expected to decline in 2020 due to ample carryover stocks of yellow maize and sorghum as well as the sluggish demand for sorghum by the feed industry.

Prices of white maize on steady rise in 2021

Prices of white maize increased steadily between March and June 2021 in line with trends in the international market. The increase was exacerbated by reduced domestic supplies from the 2021 below-average minor season harvest. In June 2021, maize prices were well above their year-earlier levels, exerting a strong upward pressure on retail prices of tortillas.

Since October 2020, prices of rice decreased in most markets due to a weakening of retail demand. Prices of black beans declined seasonally in the March-May period, following the commercialization of the 2021 minor season output.

Concerns over impact of COVID-19 pandemic on food security

According to FAO's State of Food Security and Nutrition in the World (SOFI) 2021, the prevalence of moderate or severe food insecurity in the total population increased from 25.6 percent in 2014-2016 to 26.1 percent in 2018-2020. The worsening of food security took place amid the economic downturn caused by the COVID-19 pandemic in 2020, when the Gross domestic product (GDP) decreased by 9 percent. Official estimates indicate that the poverty rate in the first quarter of 2021, calculated by the share of working age population whose income is not sufficient to purchase essential food items, increased by about 4 percentage points year on year due to income and job losses and reached nearly 40 percent.

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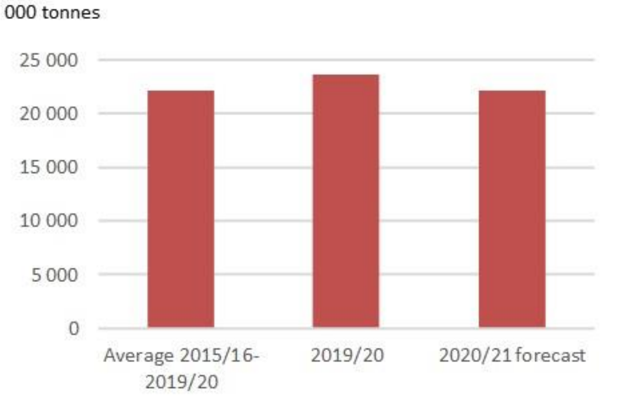
Mexico

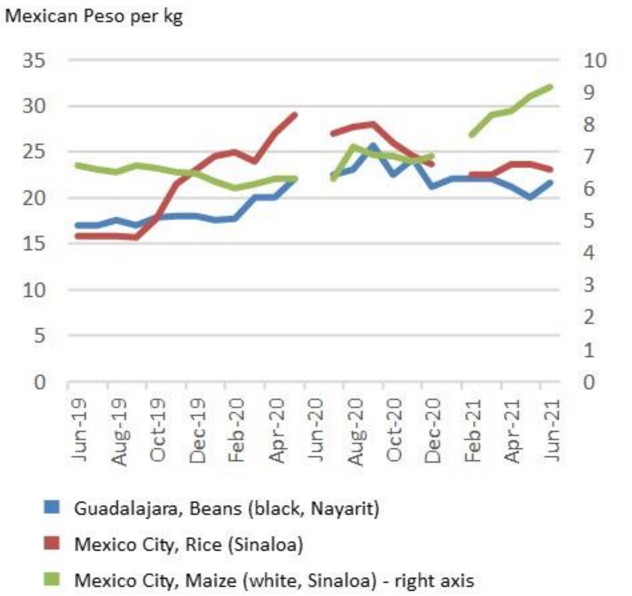
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals



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

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 12-March-2021

FOOD SECURITY SNAPSHOT

- **Unfavourable prospects for 2021 wheat crop production due to dry weather conditions**
- **Cereal production in 2020 estimated at average level**
- **Cereal import requirements in 2020/21 marketing year forecast at high levels**
- **Prices of black beans well above year-earlier values**

Unfavourable prospects for 2021 wheat crop production due to dry weather conditions

Planting operations of the 2021 main season wheat crop concluded in January. The planted area is estimated at below-average levels, as farmers have gradually shifted production to the more remunerative maize crop since 2015. According to satellite imagery, vegetation conditions of germinating crops are slightly below average in the key producing northwestern area as of mid-February (see VCI map). Drier and hotter weather conditions, forecast for the March-May period, weaken production prospects for 2021 wheat crops, as the supply of water for irrigation is likely to be reduced, with negative consequences on yields.

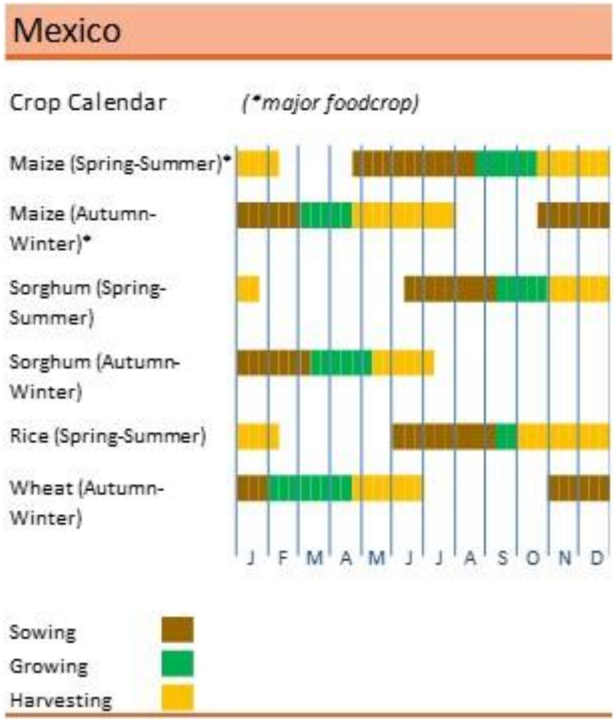
Planting of the 2021 minor season maize crop is nearly completed. The planted area is officially estimated to be close to average levels, but higher than the low levels recorded in 2020, due to production incentives by the Government. According to the incentive scheme, the Government will purchase maize grain that will be harvested in the second quarter of 2021 by medium-size farms (up to 50 hectares), granting an additional MXN 100 (about USD 5) per each tonne purchased.

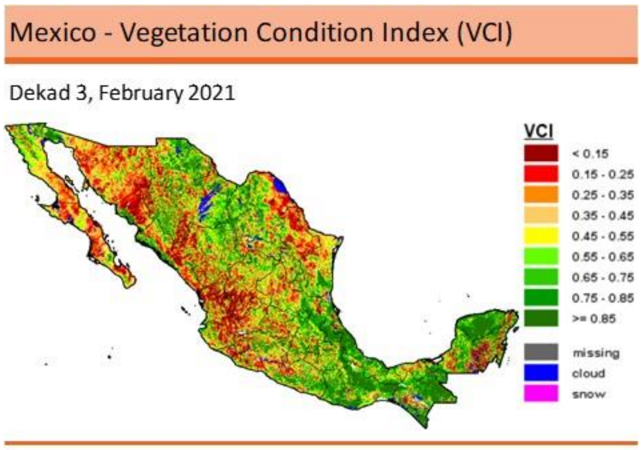
Cereal production in 2020 estimated at average level

Aggregate cereal production in 2020 is officially estimated at a near-average level of 36.4 million tonnes. The 2020 maize output, which accounts for 75 percent of the national cereal production, is estimated at average level of 27.5 million tonnes.

Cereal import requirements in 2020/21 marketing year forecast at high levels

Cereal import requirements in the 2020/21 marketing year (October/September) are forecast at a high level of 23.8 million tonnes, continuing the rising trend since 2013 mainly due to growing demand for yellow maize by the feed industry.





Source: FAO/GIEWS Earth Observation System.

Prices of grains higher year on year in February 2021

Prices of rice have been stable since November 2020 and, in February 2021, were well above their levels a year earlier. The high price level reflects an increase in domestic demand amid the COVID-19 pandemic and a significant depreciation of the domestic currency in the second quarter of 2020, which made imports costlier. Similarly, prices of white maize and black beans in February 2021 were about 25 percent higher year on year as the weak national currency increased production costs. Markets are reportedly well supplied with the 2020 maize and beans main crops, harvested in the October 2020-January 2021 period.

Mexico

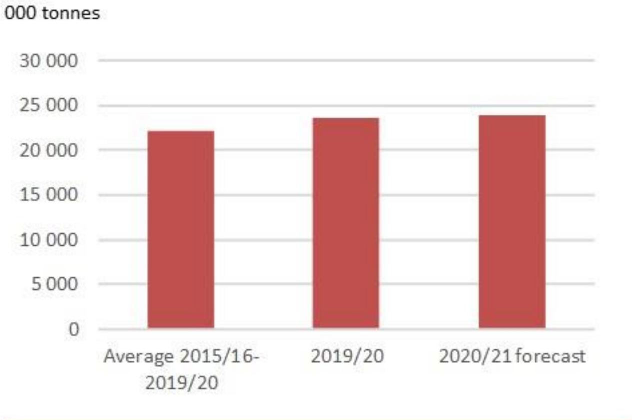
Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	27 021	27 228	27 450	0.8
Sorghum	4 787	4 353	4 762	9.4
Wheat	3 452	3 244	2 965	-8.6
Others	1 288	1 339	1 245	-7.0
Total	36 547	36 164	36 422	0.7

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

Mexico

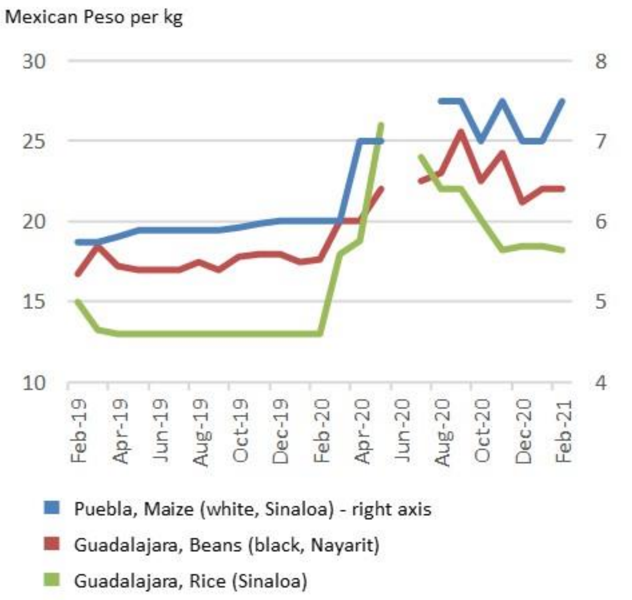
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals



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

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GIEWS Country Brief
Mexico

Reference Date: 07-August-2020

FOOD SECURITY SNAPSHOT
- **Planting of 2020 main maize and paddy crops ongoing under dry weather conditions**
- **Cereal import requirements in 2019/20 marketing year anticipated at record highs**
- **Prices of black beans well above year-earlier values**

Mexico
Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	26 965	26 950	27 100	0.6
Sorghum	4 772	4 275	4 750	11.1
Wheat	3 459	3 282	3 050	-7.1
Others	1 285	1 325	1 379	4.1
Total	36 481	35 832	36 279	1.2

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

Planting of 2020 main maize and paddy crops ongoing under dry weather conditions

Harvesting of the 2020 minor season maize crop is nearly completed and production, despite a slight reduction in plantings, is estimated at an average level of 8.2 million tonnes. The harvest of the 2020 main season wheat crop, which accounts for 95 percent of the total annual production, also finalized. Production is estimated at 2.9 million tonnes, nearly 20 percent lower than the previous five-year average. The low output reflects the continuous contraction in the planted area in the last five years as farmers have shifted to crops that are more profitable. Furthermore, the limited availability of irrigation water during the planting period curtailed the planted area.

Planting of the 2020 main season maize and paddy crops is underway and the key producing central-western areas are experiencing moderate soil moisture deficits due to the below-average rainfall amounts in the June-July period. Weather forecasts point to average to above-average rainfall amounts during the August-October period, which is expected to replenish soil moisture and be favourable for crop growth.

The Ministry of Agriculture continues to support smallholder farmers for the second consecutive year by purchasing maize, beans, wheat, rice and fresh milk at fixed prices that are higher than the market prices. In addition, in order to boost domestic maize production, the Ministry will implement guaranteed prices for medium-sized farms (up to 50 hectares).

Cereal import requirements in 2019/20 marketing year anticipated at record highs

Cereal import requirements are officially forecast at 24.4 million tonnes in the 2019/20 marketing year (October/September), an all-time high and about 20 percent above the five-year average. The increase mainly reflects the increased demand of yellow maize by the feed industry, compounded by higher import needs of wheat grain and flour following the reduced harvests in 2019 and 2020.

Prices of white maize and black beans started to decline since May

Prices of white maize and black beans increased sharply in March and April, reflecting the increased domestic demand and a significant depreciation of the domestic currency amid the COVID-19 pandemic. Prices of maize declined since May due to increased market availabilities from the harvest of the minor season crop, and as of June 2020, they were near their year-earlier levels. Prices of beans only slightly decreased in May and were nearly 40 percent higher year on year. Prices of rice remained stable during the first half of 2020 and were similar to a year earlier in June.

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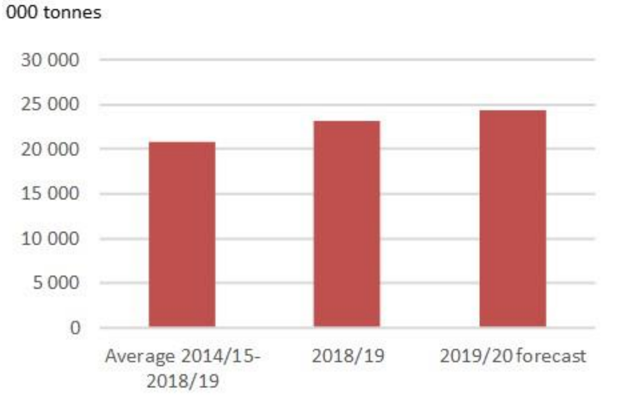
Mexico

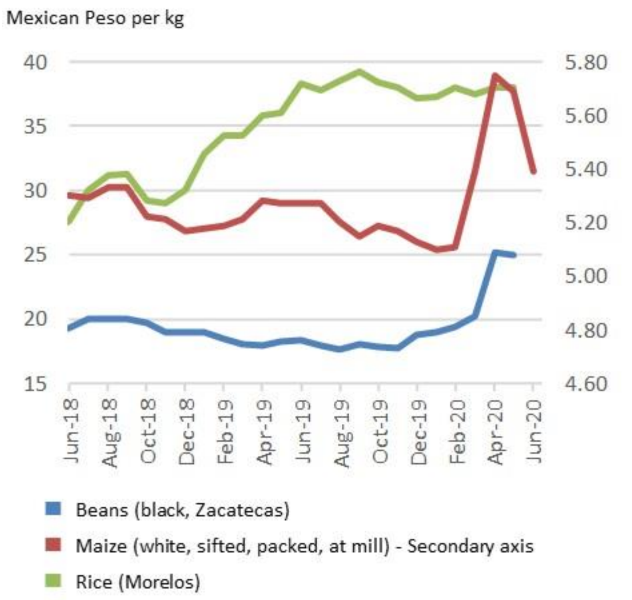
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals in Mexico City



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

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 18-November-2019

FOOD SECURITY SNAPSHOT
- **Cereal production for 2019 anticipated at below-average level due to low plantings**
- **Cereal imports in 2019/20 marketing year forecast at record highs**
- **Prices of white maize and beans stable**

Cereal production for 2019 anticipated at below-average level due to low plantings

Aggregate cereal output in 2019 is anticipated at 34.77 million tonnes, about 5 percent below the five-year average as a result of reduced plantings of maize, wheat and sorghum.

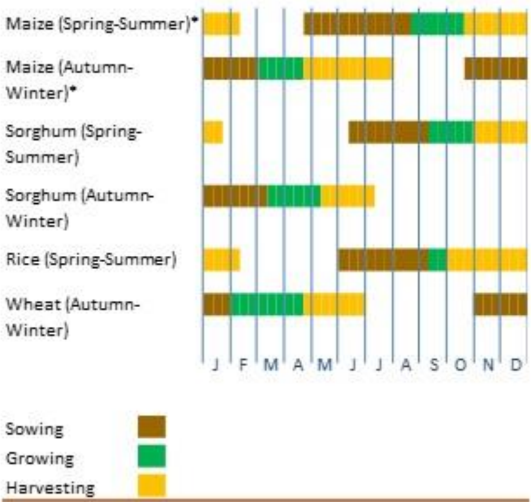
Harvesting of the 2019 main (summer) season maize crop, which accounts for 70 percent of the annual production, is ongoing. The output is expected at below-average levels due to limited rainfalls in the June-August period that lowered plantings and affected crop development. According to official estimates, the area sown during the main season was about 8 percent lower than the five-year average and about 5 percent of the area planted, mainly in eastern and central regions and reported crop losses due to drought conditions (see the VHI map). The 2019 aggregate maize production is anticipated at a near-average 25 million tonnes as the above average minor (winter) season output, harvested last June/July, compensated the expected downturn in the main season.

Harvesting of the 2019 minor (summer) season wheat crop is underway. The aggregate wheat production in 2019, including the main season output gathered in June, is expected at 3.28 million tonnes, about 7 percent below average. Although plantings of the minor season showed a slight increase, the area planted of the main season, that explains 95 percent of the annual production, is officially estimated at a below-average level as a result of farmers' shift to more remunerative crops.

Harvesting of the 2019 minor (summer) season sorghum is ongoing and yields of the harvested crops were reportedly good despite dry weather conditions thanks to the crop's tolerance to water deficits. The 2019 aggregate sorghum production, including the main season output harvested in the second quarter of 2019, is anticipated at a below-average level, reflecting a contraction in plantings in both seasons. The planted area of sorghum has reduced for the fifth consecutive year, as famers shifted to more remunerative crops.

Mexico

Crop Calendar (*major foodcrop)



Mexico

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	26 130	26 671	25 583	-4.1
Sorghum	5 652	4 815	4 522	-6.1
Wheat	3 541	2 936	3 282	11.8
Others	1 255	1 359	1 381	1.6
Total	36 579	35 781	34 768	-2.8

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

Mexico - Vegetation Health Index (VHI)

September 2019

Source: FAO/GIEWS Earth Observation System.

Cereal imports in 2019/20 marketing year forecast at record highs

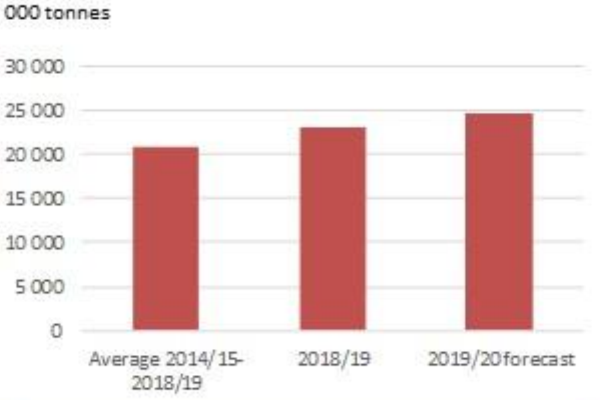
Cereal import requirements in the 2019/20 marketing year (October/September) are forecast at 24.5 million tonnes, an all-time high and about 20 percent above the five-year average. The increase mainly reflects the higher demand of yellow maize by the feed industry, compounded by the expected below-average cereal production in 2019.

Prices of white maize and beans stable

Prices of white maize remained stable in the third quarter of 2019, mainly reflecting the above-average output of the minor season harvest completed in July. Prices of black beans steadily decreased in 2019 due to bumper harvests from the previous year. By contrast, prices of rice have been increasing since the beginning of 2019 and, in October, were well above their values a year earlier, mainly due to reduced imports, which account for more than 70 percent of domestic requirements.

Mexico

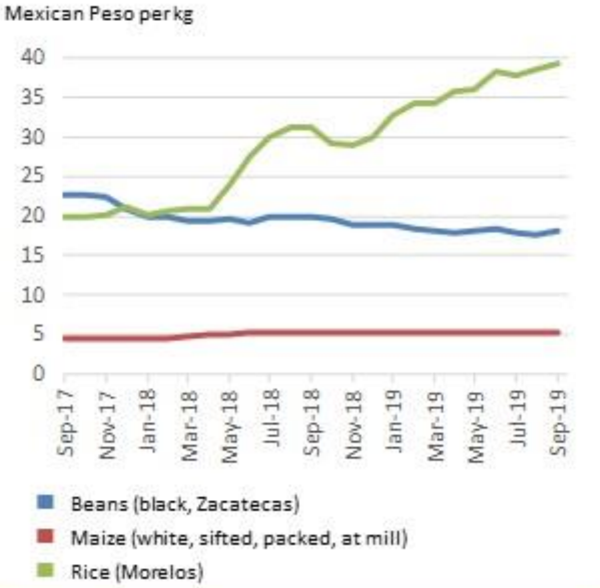
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals in Mexico City



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

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Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 18-November-2019

FOOD SECURITY SNAPSHOT

- **Cereal production for 2019 anticipated at below-average level due to low plantings**
- **Cereal imports in 2019/20 marketing year forecast at record highs**
- **Prices of white maize and beans stable**

Cereal production for 2019 anticipated at below-average level due to low plantings

Aggregate cereal output in 2019 is anticipated at 34.77 million tonnes, about 5 percent below the five-year average as a result of reduced plantings of maize, wheat and sorghum.

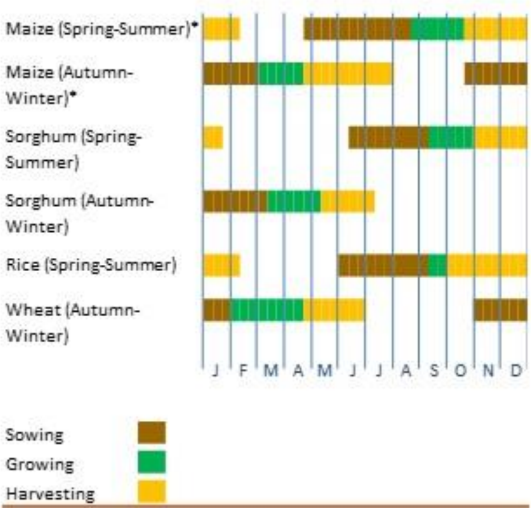
Harvesting of the 2019 main (summer) season maize crop, which accounts for 70 percent of the annual production, is ongoing. The output is expected at below-average levels due to limited rainfalls in the June-August period that lowered plantings and affected crop development. According to official estimates, the area sown during the main season was about 8 percent lower than the five-year average and about 5 percent of the area planted, mainly in eastern and central regions and reported crop losses due to drought conditions (see the VHI map). The 2019 aggregate maize production is anticipated at a near-average 25 million tonnes as the above average minor (winter) season output, harvested last June/July, compensated the expected downturn in the main season.

Harvesting of the 2019 minor (summer) season wheat crop is underway. The aggregate wheat production in 2019, including the main season output gathered in June, is expected at 3.28 million tonnes, about 7 percent below average. Although plantings of the minor season showed a slight increase, the area planted of the main season, that explains 95 percent of the annual production, is officially estimated at a below-average level as a result of farmers' shift to more remunerative crops.

Harvesting of the 2019 minor (summer) season sorghum is ongoing and yields of the harvested crops were reportedly good despite dry weather conditions thanks to the crop's tolerance to water deficits. The 2019 aggregate sorghum production, including the main season output harvested in the second quarter of 2019, is anticipated at a below-average level, reflecting a contraction in plantings in both seasons. The planted area of sorghum has reduced for the fifth consecutive year, as famers shifted to more remunerative crops.

Mexico

Crop Calendar (*major foodcrop)



Mexico

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	26 130	26 671	25 583	-4.1
Sorghum	5 652	4 815	4 522	-6.1
Wheat	3 541	2 936	3 282	11.8
Others	1 255	1 359	1 381	1.6
Total	36 579	35 781	34 768	-2.8

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

Mexico - Vegetation Health Index (VHI)

September 2019

Source: FAO/GIEWS Earth Observation System.

Cereal imports in 2019/20 marketing year forecast at record highs

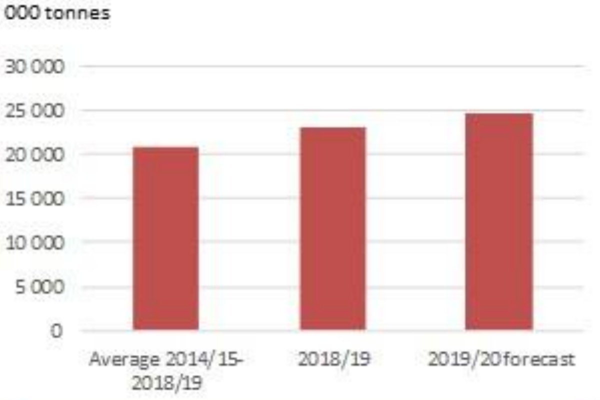
Cereal import requirements in the 2019/20 marketing year (October/September) are forecast at 24.5 million tonnes, an all-time high and about 20 percent above the five-year average. The increase mainly reflects the higher demand of yellow maize by the feed industry, compounded by the expected below-average cereal production in 2019.

Prices of white maize and beans stable

Prices of white maize remained stable in the third quarter of 2019, mainly reflecting the above-average output of the minor season harvest completed in July. Prices of black beans steadily decreased in 2019 due to bumper harvests from the previous year. By contrast, prices of rice have been increasing since the beginning of 2019 and, in October, were well above their values a year earlier, mainly due to reduced imports, which account for more than 70 percent of domestic requirements.

Mexico

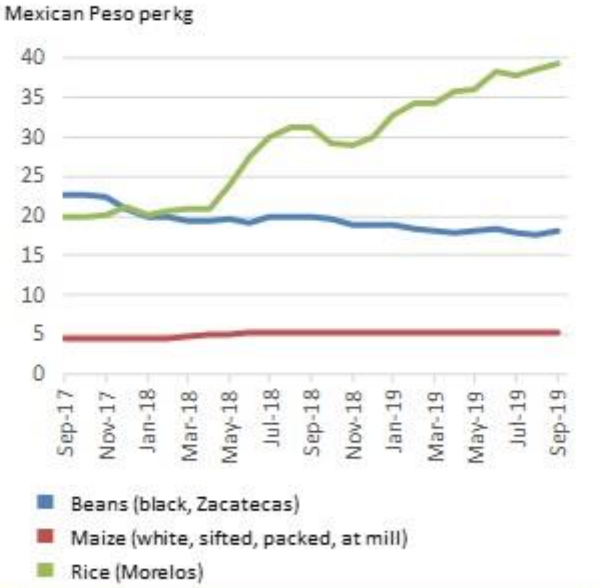
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals in Mexico City



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

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Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 02-August-2019

FOOD SECURITY SNAPSHOT

- **Cereal production in 2019 estimated at near-average level**
- **Cereal imports in 2018/19 marketing year expected well above-average**
- **Prices of white maize and beans stable**

Mexico

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	26 130	26 671	27 315	2.4
Sorghum	5 652	4 815	5 085	5.6
Wheat	3 541	2 936	3 220	9.7
Others	1 255	1 359	1 368	0.7
Total	36 579	35 781	36 988	3.4

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

Cereal production for 2019 forecast at near-average level

Harvesting of the 2019 minor (winter) season maize crop is well advanced and yields of the harvested crops are reported to be above average. Combined with increased plantings, the output is expected at an above-average level. At the same time, planting of the main (summer) season maize crop, mostly rainfed, is ongoing. Although the official planting intention survey points to a near-average area, the planting progress as of end-June is slightly slower than the previous years, mainly reflecting below-average precipitation in the key producing areas. Given the outcome of the autumn/winter crop already gathered and the current outlook for the main season, the 2019 aggregate maize output is forecast at 27 million tonnes, about 5 percent above the average of the last five years.

Harvesting of the main (winter) season wheat crop is nearing conclusion and production is estimated at a below-average level. This is mainly due to lower-than-average plantings, despite a rebound from last year's low level. Plantings of the main season, which accounts for 95 percent of the annual production, have been declining since 2016, as farmers shifted to more remunerative maize crops. According to the planting intention survey, a modest increase in plantings of the minor (summer) season wheat crop, to be harvested in November, is expected. Therefore, the 2019 aggregate wheat production is forecast at 3.2 million tonnes, about 9 percent below the last five-year average.

Harvesting of the 2019 main (winter) season sorghum is almost concluded. Area planted of the main season is officially estimated at a below-average level and yields of the harvested crops are a record low due to dryness during the crop development stage and excessive rainfall during the harvesting period in the main producing Tamaulipas Region. Planting operations of the minor (summer) season crop are ongoing. With an expected increase in plantings in the minor season crop, which accounts for about

40 percent of the annual production, the 2019 aggregate sorghum production is anticipated at 5.1 million tonnes, about 10 percent lower than the last five-year average.

Aggregate cereal output in 2019 is anticipated at 36.9 million tonnes, near the average of the last five years.

Cereal imports in 2018/19 marketing year expected well above-average

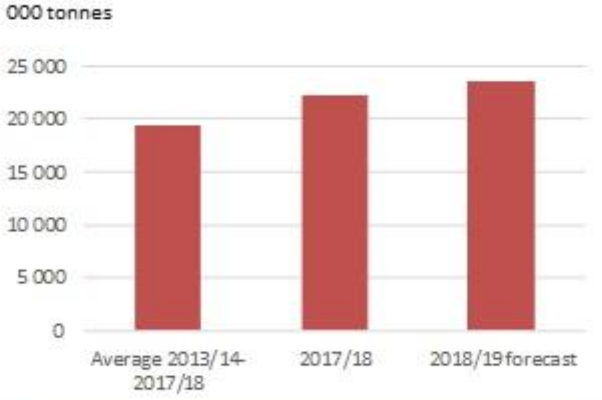
Cereal import requirements in the 2018/19 marketing year (October/September) are expected at 23.4 million tonnes, about 20 percent above the five-year average. The increase mainly reflects the higher demand of yellow maize by the feed industry and of wheat for food use.

Prices of white maize and beans stable

Prices of white maize remained virtually unchanged in the second quarter of 2019 and near their year-earlier levels, as improved market supplies from the ongoing harvest offset the upward pressure from the reduced 2018 output. Prices of black beans were also relatively stable during the same period, as the recently completed harvests of the minor season are supplying the market. By contrast, prices of rice have been increasing since the beginning of 2019 and were higher than their values a year earlier, despite the ongoing minor season harvest and similar a level of outputs compared to those of last year.

Mexico

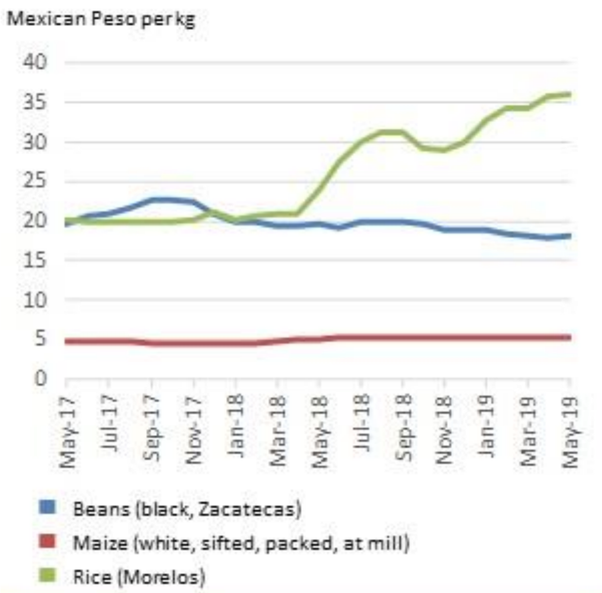
Cereals Imports



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.

Mexico

Wholesale prices of selected cereals in Mexico City



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

Food and Agriculture Organization
of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 21-August-2018

FOOD SECURITY SNAPSHOT

- **Cereal production in 2018 estimated at near-average level**
- **Cereal imports in 2017/18 marketing year slightly higher year-on-year due to sustained demand for yellow maize**
- **Prices of white maize above year-earlier levels, while good harvest pushed down prices of black beans**

Cereal production for 2018 estimated at near-average level

Harvesting of the 2018 autumn/winter season maize crop is nearing completion. Although the area sown contracted slightly, the average yields are reported to be higher than in the previous year and thus the output of this crop is estimated to change little from the previous year's same season. Planting of the main spring/summer season maize crop started in May under generally favourable weather conditions. The official planting intention survey suggests a lower planting area for the main season. Given the outcome of the autumn/winter crop already gathered and the current outlook for the main season, the aggregate maize output in 2018 is forecast at 27 million tonnes, 3 percent down from the previous year but 7 percent above the average of the last five years.

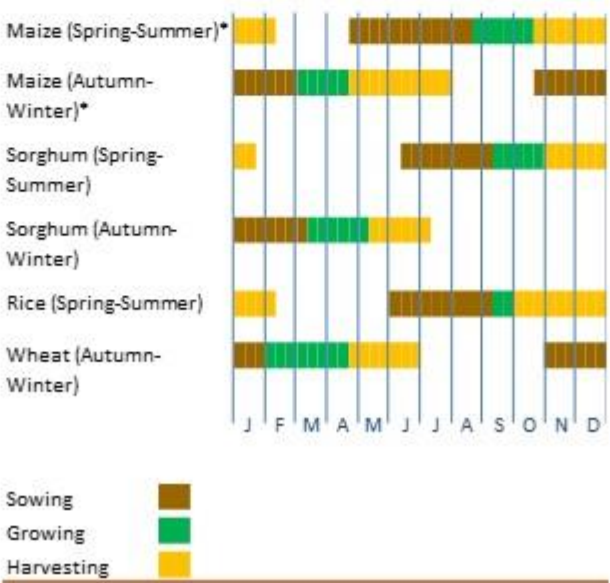
Production of the main autumn/winter season wheat crop, harvesting of which is nearing conclusion, is expected to decrease due to the reduction of the planted area by about 22 percent. The decrease is largely due to dry weather conditions in the major wheat-producing Sonora and Baja California states during the planting period, which encouraged producers to plant other crops. Therefore, the 2018 wheat production is estimated at 2.9 million tonnes, 20 percent below the last five-year average.

Harvesting of the 2018 autumn/winter season sorghum is well advanced and a reduction in the area sown is expected as sorghum prices were low at planting time. In addition, yields have been slightly affected by dryness during the crop development stage and excessive rainfall during the harvesting period in the main producing Tamaulipas Region. As a result, the 2018 sorghum production is estimated at 5.2 million tonnes, 12 percent lower than the last five-year average.

Aggregate cereal output in 2018 is estimated at a near-average level of 36.7 million tonnes.

Mexico

Crop Calendar (*major foodcrop)



Mexico

Cereal Production

	2012-2016 average	2016	2017 forecast	change 2017/2016
		000 tonnes		percent
Maize	24 190	28 250	28 119	-0.5
Sorghum	6 269	5 017	5 000	-0.3
Wheat	3 582	3 884	3 494	-10.0
Others	1 149	1 300	1 367	5.2
Total	35 190	38 451	37 980	-1.2

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

Cereal imports in 2017/18 marketing year slightly higher year-on-year due to sustained demand for yellow maize

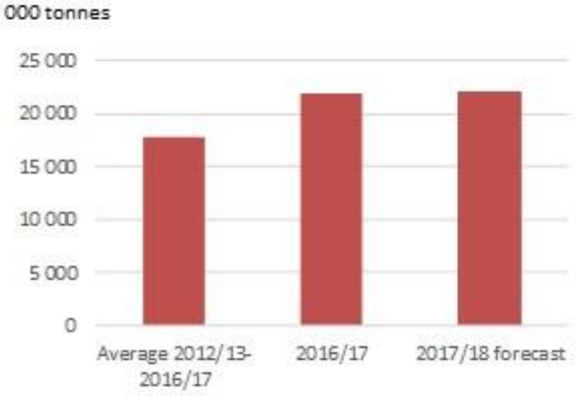
Cereal import requirements in the 2017/18 marketing year (October/September) are anticipated at 22 million tonnes, slightly higher than last year's level and about 12.5 percent above the five-year average. The increase mainly reflects the higher demand for yellow maize imports by the feed industry coupled with this year's expected year-on-year decline in output.

Prices of white maize above year-earlier levels, while good harvest pushed down prices of black beans

Prices of white maize have been increasing from the beginning of 2018. In July 2018, prices started to decline following the improved supply from the ongoing harvest. However, prices were still 10 percent higher than their levels a year earlier, sustained by concerns over a year-on-year reduced output. By contrast, July prices of black beans were lower than their levels last year, reflecting the increased 2018 output compared to the 2017 autumn/winter season.

Mexico

Cereals imports

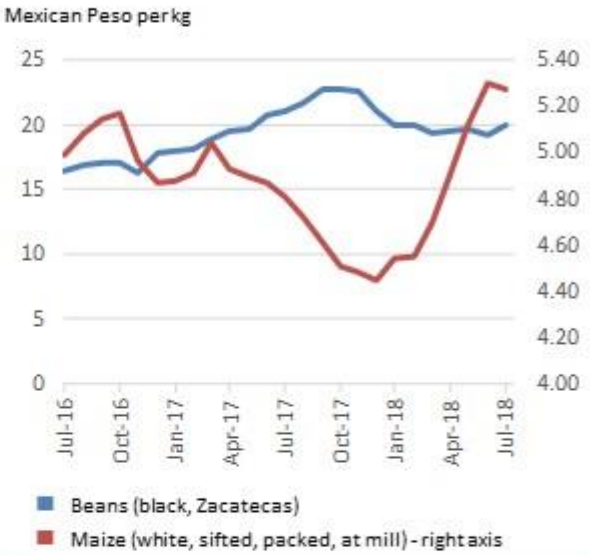


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Mexico

Wholesale prices of maize and beans in Mexico City



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

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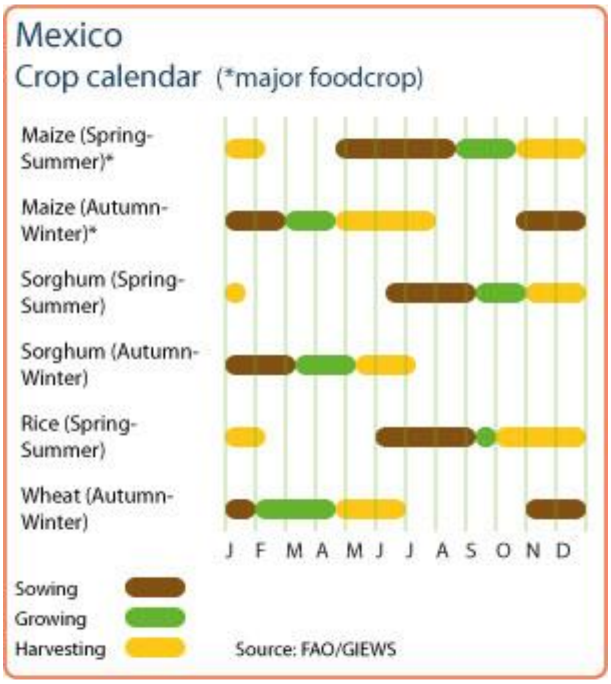
Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 22-November-2017

FOOD SECURITY SNAPSHOT
- **Cereal production for 2017 estimated well above average**
- **Cereal imports in 2016/17 marketing year unchanged from previous year**
- **Prices of white maize stable and below year-earlier levels, black beans increased seasonally**



Cereal production for 2017 estimated well above average

Cereal output in 2017 is estimated at almost 35.8 million tonnes, some 5 percent below its record level a year earlier, but well above average. The harvest of the 2017 spring/summer crops is well advanced and early estimates point to a reduction in output mainly reflecting lower sowings. Production of the 2017 wheat crop is anticipated to reach some 3.6 million tonnes, below last year's level, but well above the average. Production of the spring/summer maize crop, whose harvest concludes in December, is estimated below last year's high level, as ample availabilities and farmers' low returns led to lower sowings. The 2017 maize aggregate output (autumn/winter and spring/summer) is anticipated to reach some 26 million tonnes or 5 percent below last year's record output. However, at this level maize output remains well above the country's average.

Planting of the 2018 autumn/winter maize and wheat crops is underway. According to official forecasts, maize plantings are expected to reach up to 1.26 million hectares during the season, some 5 percent above its level for the same season last year. By contrast, autumn/winter wheat plantings are anticipated to remain relatively unchanged from the same season last year and reach 590 000 hectares.

Mexico

Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Maize	24 187	27 578	26 000	-6
Sorghum	6 269	5 017	5 000	0
Wheat	3 583	3 892	3 600	-8
Others	1 174	1 146	1 155	1
Total	35 213	37 633	35 755	-5

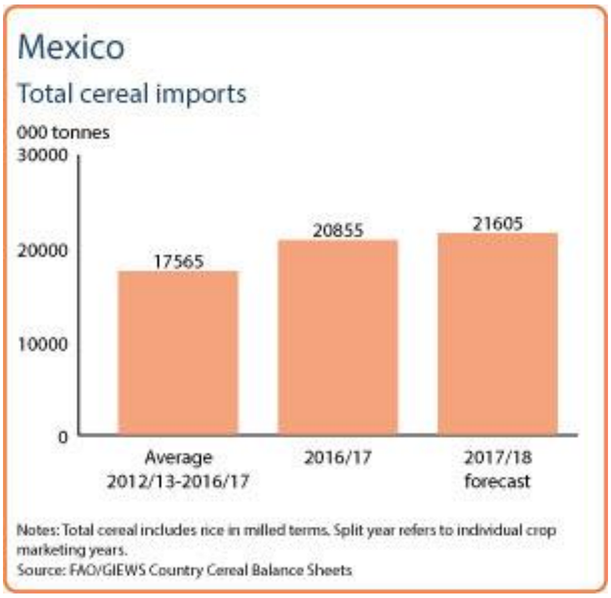
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal imports in 2016/17 marketing year unchanged from previous year

Cereal imports in the 2017/18 marketing year (October/September) are anticipated to reach 21.6 million tonnes, some 3.5 percent above their level in the previous marketing year. The increase mainly reflects the higher demand for yellow maize imports by the feed industry coupled with this year's reduced output.

Prices of white maize stable and below year-earlier levels, while prices of black beans increased seasonally

White maize prices in October were relatively stable and generally below their levels a year earlier due to adequate supplies from the spring/summer crop. By contrast, prices of black beans increased seasonally in October and were higher than a year earlier.

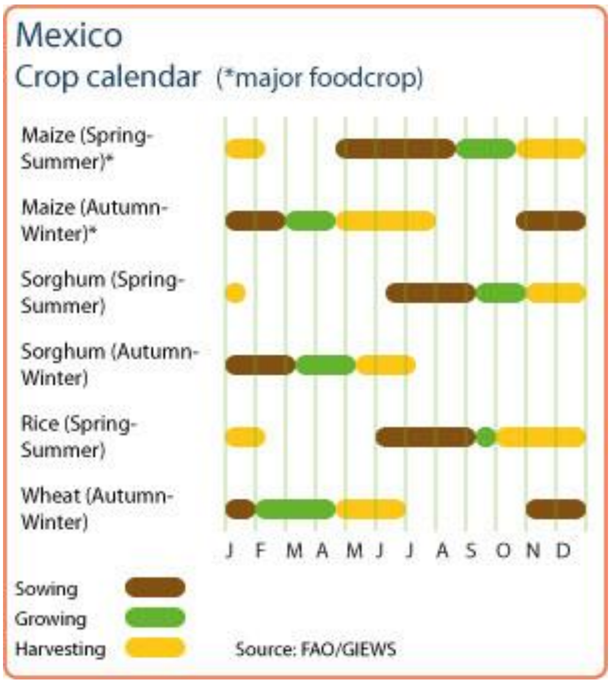


Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 06-June-2017

FOOD SECURITY SNAPSHOT
- **Favourable prospects for 2017 cereal production**
- **Cereal imports in 2016/17 marketing year unchanged from previous year**
- **Prices of black beans continued to increase in May, maize prices stable**



Mexico

Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	24 187	27 578	28 000	2
Sorghum	6 269	5 017	5 000	0
Wheat	3 583	3 892	3 900	0
Others	1 176	1 153	1 155	0
Total	35 215	37 640	38 055	1

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

Favourable prospects for 2017 cereal production

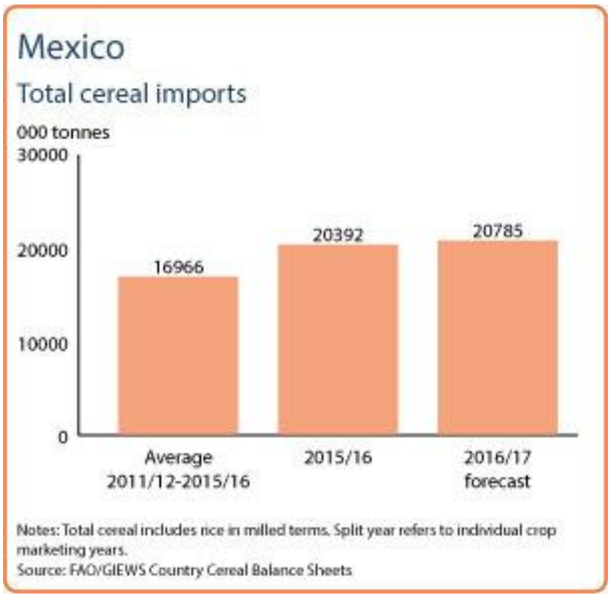
The harvest of the 2017 autumn/winter maize and wheat is underway, while planting of the 2017 spring/summer maize and wheat crops is well advanced. Reduced plantings in the autumn/winter wheat crop are anticipated to be offset by higher yields and greater plantings for the spring/summer crop. Early prospects are favourable for the 2017 wheat crop that is forecast at about 4 million tonnes, virtually unchanged from last year's above average level. The 2017 maize crop (autumn/winter and spring/summer) is anticipated to reach some 28 million tonnes, a bumper crop, reflecting above average sowings, favoured by relatively normal precipitation levels, and anticipated higher yields. Assuming normal weather conditions during the ongoing spring/summer season, FAO's first forecast for the country's 2017 overall cereal production points to a record output of 38 million tonnes.

Cereal imports in 2016/17 marketing year unchanged from previous year

Cereal imports in the 2016/17 marketing year (October/September) are anticipated to reach 20.8 million tonnes, virtually unchanged from last year, but well above the average. High maize imports for feed, which are expected to cover one-third of the domestic utilization, helped to maintain cereal imports well above average levels.

Prices of black beans continued to increase in May, maize prices stable

Prices of black beans continued in May their increasing trend of the previous months. The reduced 2016/17 harvests and increased production costs kept prices of black beans some 27 percent higher than in April last year. By contrast, maize prices were generally stable during the month of May, but were well above their levels from a year earlier supported by high fuel prices and increased production costs.



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Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 03-March-2017

FOOD SECURITY SNAPSHOT
- **Good early prospects for 2017 autumn/winter cereal crop production despite reduced sowings**
- **Cereal production in 2016 estimated at record level**
- **Cereal imports in 2016/17 marketing year unchanged from previous year**
- **Prices of white maize and black beans followed mixed trends in February, both higher than a year earlier**

Favourable prospects for cereal production for 2017 autumn/winter crops despite reduced sowings

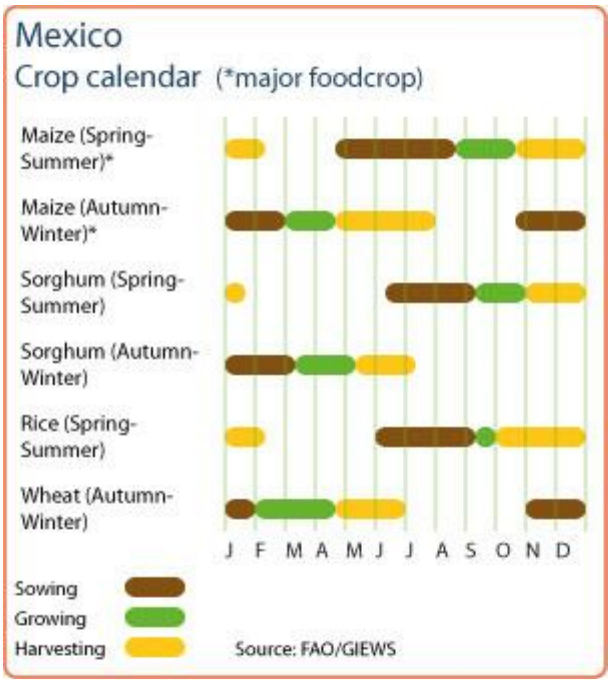
Planting of the 2017 autumn/winter wheat and maize crops concluded in February. Weather conditions were favourable during the planting season. Early official estimates point to a decline of 13 percent in the area sown to wheat from the same season last year to about 510 000 hectares below the average. The decline in area sown mainly reflects the bumper 2016 wheat output and low domestic demand. Similarly, reflecting multiple years of bumper white maize crops, the area sown for the 2017 autumn/winter crop has been preliminarily estimated close to 1 million hectares, 8 percent below the same season last year but well above the average. If the rest of the season progresses normally, maize output should remain close to last year's high level.

Cereal production in 2016 estimated at record level

Total cereal production for 2016 has been estimated at a record 37.6 million tonnes. The higher output mainly reflects larger white maize output due to increased sowings. Wheat production also increased significantly to 3.9 million tonnes in 2016 reflecting both higher yields and area.

Cereal imports in 2016/17 marketing year unchanged from previous year

Cereal imports in the 2016/17 marketing year (October/September) are anticipated to reach 20 million tonnes, virtually unchanged from last year, but well above the average. Higher maize imports for feed, which are expected to cover one-third of the domestic utilization, helped to maintain cereal imports



Mexico
Cereal production

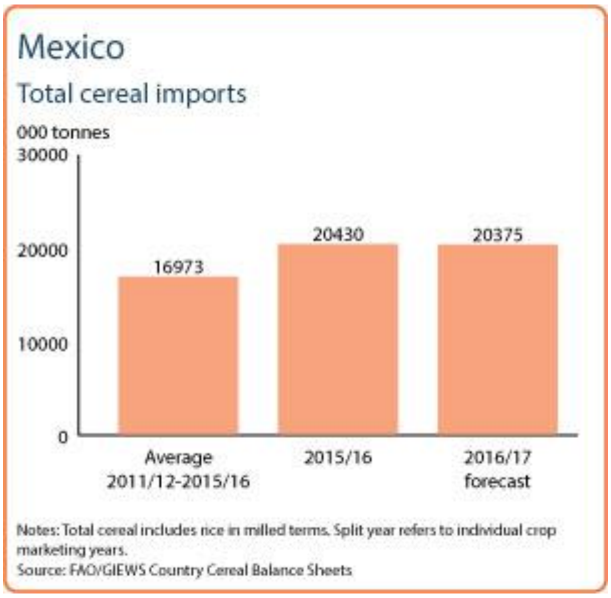
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	22 199	24 694	27 578	12
Sorghum	6 551	5 195	5 017	-3
Wheat	3 530	3 711	3 892	5
Others	1 104	1 119	1 143	2
Total	33 384	34 719	37 630	8

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

close to last year's level. Wheat and rice imports are also forecast to increase moderately during the marketing year.

Prices of white maize and black beans followed mixed trends in February, both higher than a year earlier

White maize prices in February declined for the third consecutive month, mainly reflecting ample availabilities from the bumper 2016 crop. However, the continued weakness in the local currency, coupled with seasonal factors, maintained prices above last year's level. Prices of black beans, by contrast, continued to increase for the fifth consecutive month as high domestic demand pressured prices. Prices were 21 percent above their level from a year earlier, pressured as well by the weak local currency.



Food and Agriculture Organization of the United Nations

GIEWS Country Brief
Mexico

Reference Date: 16-November-2016

FOOD SECURITY SNAPSHOT
- **Cereal production in 2016 forecast at record level**
- **Cereal imports in 2016/17 marketing year unchanged from previous year**
- **White maize and black bean prices in October followed mixed trends, both higher than year earlier**

Cereal production in 2016 forecast at record level

Total cereal production for 2016 is forecast at 36.5 million tonnes (paddy equivalent), a record level. This follows the good output of the 2016 autumn/winter maize crop, harvested in August, which has been estimated at 8.5 million tonnes, 16 percent above the same season last year. Harvest of the spring/summer maize crop is well advanced and prospects are good as weather conditions during the season favoured normal crop development. Aggregate maize production (autumn/winter and spring/summer crops) for 2016 is forecast at a record level of 25.6 million tonnes. Harvesting of the 2016 wheat crop concluded in July and preliminary estimates point to an output of 3.8 million tonnes, 2 percent above last year's level and well above the five-year average.

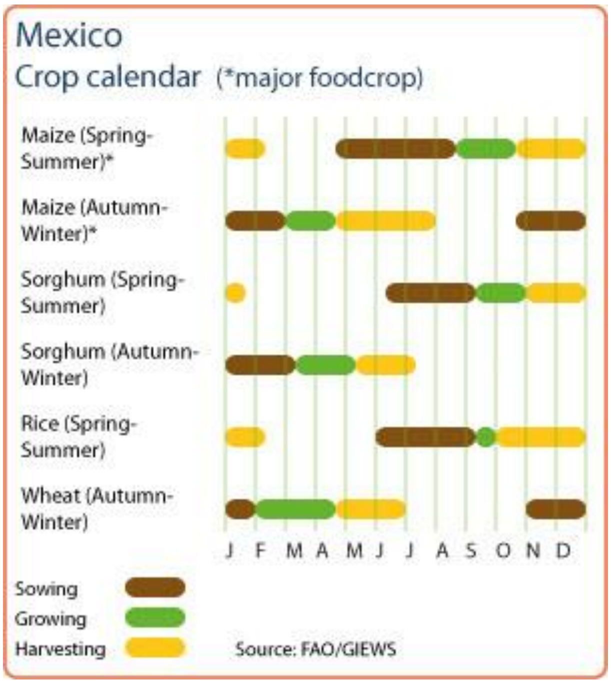
Planting of the 2017 autumn/winter crop is well advanced, while no information is yet available on sowings, weather conditions have been adequate for planting operations.

Cereal imports in 2016/17 marketing year unchanged from previous year

Cereal imports in the 2016/17 marketing year (October/September) are anticipated to reach 19.7 million tonnes, virtually unchanged from last year, but well above the average. Higher maize imports for feed, which are expected to cover a third of the domestic utilization, helped maintained cereal imports close to last year's level. Wheat and rice imports are also forecast to increase moderately during the marketing year.

White maize and black bean prices in October followed mixed trends, both higher than year earlier

White maize prices continued to increase in October and were overall higher than a year earlier, the weakness of the local currency, which strengthened seasonal trends, coupled with the lack of new product from the ongoing spring/summer crop



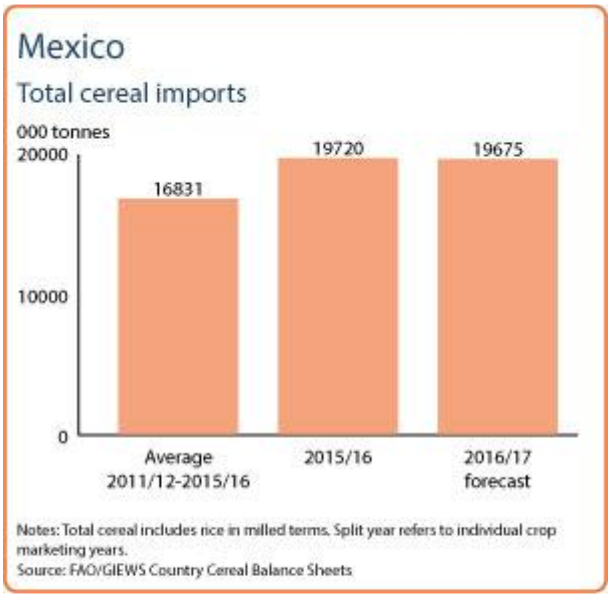
Mexico

Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Maize	22 199	24 694	25 635	4
Sorghum	6 551	5 195	5 909	14
Wheat	3 530	3 711	3 784	2
Others	1 104	1 119	1 143	2
Total	33 384	34 719	36 471	5

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

supported prices. Black bean prices, an important staple food, were relatively unchanged in October but higher than a year earlier sustained by the weak local currency.



GIEWS Country Brief
Mexico

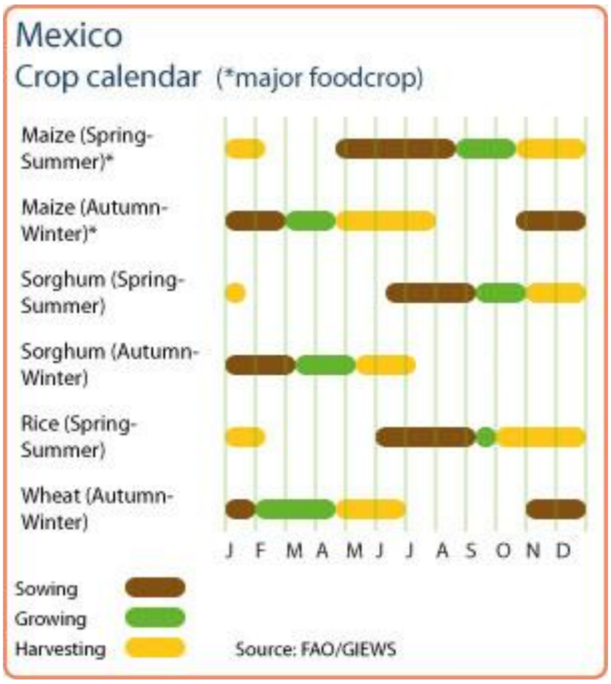
Reference Date: 21-Septemeber-2016

FOOD SECURITY SNAPSHOT

- **Cereal production in 2016 forecast at record level**
- **Cereal imports in 2016/17 marketing year are forecast at high level**
- **White maize and black bean prices increased in August 2016**

Cereal production in 2016 forecast at record level

Total cereal production for 2016 is forecast at 36.5 million tonnes (paddy equivalent), a record level. This follows the good output of the 2016 autumn/winter maize crop, harvested in August, which has been estimated at 6.7 million tonnes, 20 percent above the same season last year. The outlook for the spring/summer maize crop, recently planted, is also favourable as the area planted is estimated to have remained close to the last year's good level. Aggregate maize production (autumn/winter and spring/summer crops) for 2016 is forecast at a record level of 25.7 million tonnes. Harvesting of the 2016 wheat crop concluded in July and preliminary estimates point to an output of 3.8 million tonnes, 2 percent above last year's level and well above the five-year average.



Mexico

Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	22,199	24,694	25,746	4
Sorghum	6,551	5,195	5,909	14
Wheat	3,530	3,711	3,784	2
Others	1,103	1,121	1,121	0
Total	33,384	34,721	36,560	5

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

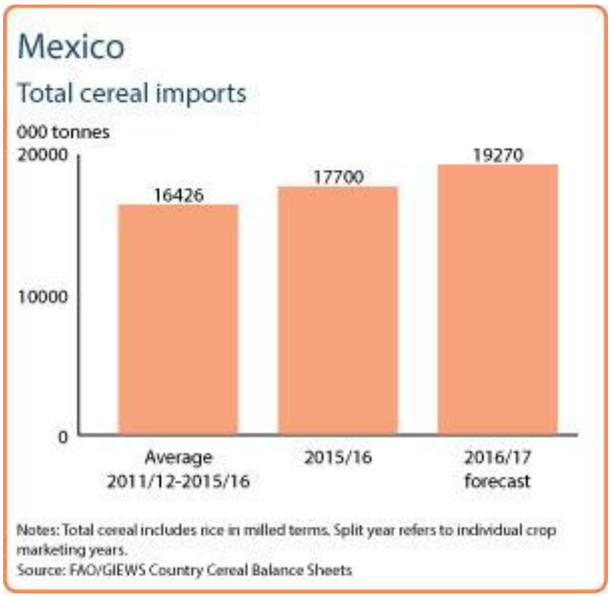
Cereal imports in 2016/17 marketing year are forecast at high level

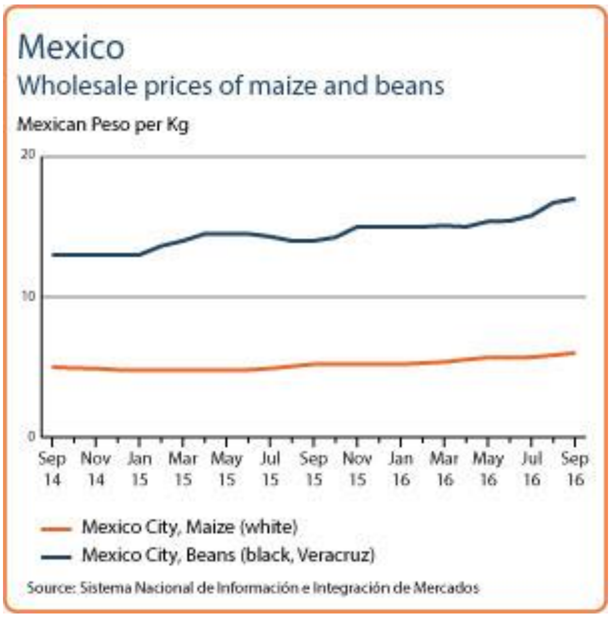
Cereal imports in the 2016/17 marketing year (October/September) are anticipated to reach19.3 million tonnes, 8 percent above last year's level and above the five-year average. The increase mainly reflects higher maize imports for feed, which are expected to cover a third of domestic utilization. Wheat and rice imports are also forecast to increase moderately during the marketing year.

White maize and black bean prices increased in August

White maize prices increased in August after the completion of the 2016 autumn/winter harvest. Prices were above their levels in August last year due to the weak local currency and sustained export demand. A recent increase in fuel prices added to the upward pressure.

Black bean prices increased sharply in August, with seasonal trends exacerbated by the weak local currency and increased fuel costs.


Mexico
Total cereal imports
000 tonnes
20000
10000
0
16426
17700
19270
Average 2011/12-2015/16
2015/16
2016/17 forecast
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets


Mexico
Wholesale prices of maize and beans
Mexican Peso per Kg
20
10
0
Sep 14
Nov 14
Jan 15
Mar 15
May 15
Jul 15
Sep 15
Nov 15
Jan 16
Mar 16
May 16
Jul 16
Sep 16
Mexico City, Maize (white)
Mexico City, Beans (black, Veracruz)
Source: Sistema Nacional de Información e Integración de Mercados

GIEWS Country Brief
Mexico

Reference Date: 3-August-2016

FOOD SECURITY SNAPSHOT
- **Cereal production in 2016 forecast at record level**
- **Cereal imports in 2016/17 marketing year are forecast at high level**
- **White maize prices were unchanged during first half of July, black bean prices increased**

Cereal production in 2016 forecast at record level

Harvesting of the 2016 autumn/winter maize crop is well advanced, and early estimates point to an output of 6.7 million tonnes or 20 percent above the same season last year. Planting of the spring/summer maize crop is well underway, and area planted is expected to remain close to last year's level. Aggregate maize production (autumn/winter and spring/summer crops) for 2016 is forecast at a record level of 25.7 million tonnes. Harvesting of the 2016 wheat crop is virtually concluded, and preliminary estimates point to output reaching 3.8 million tonnes or 2 percent above last year's level and above the five-year average. Given the good crops already harvested this year and in view of the favourable prospects so far for the spring/summer crops, total cereal production for 2016 is forecast at 36.5 million tonnes (paddy equivalent), a record level.

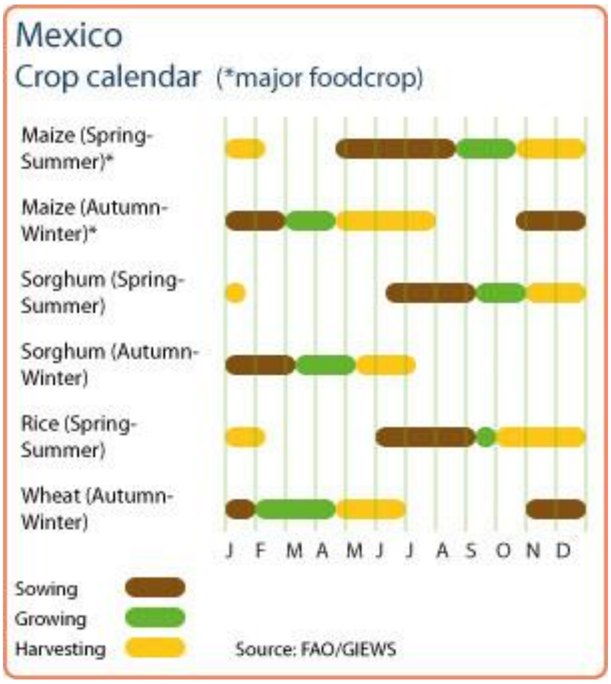
Cereal imports in 2016/17 marketing year are forecast at high level

Cereal imports in the 2016/17 marketing year (October/September) are anticipated to reach19.3 million tonnes or 8 percent above last year's level and above the five-year average. The increase mainly reflects higher maize imports for feed, which are expected to cover a third of domestic utilization. Wheat and rice imports are also forecast to increase moderately during the marketing year.

White maize prices were unchanged during first half of July, black bean prices increased

Maize prices remained unchanged in July, reflecting the entry to the market of product from the autumn/winter harvest. However, prices remained significantly above the same period last year, pressured by the weak local currency.

Black bean prices increased in July and were well above last year's level, pressured by tight supplies from this year's reduced harvest and the weak local currency.



Mexico

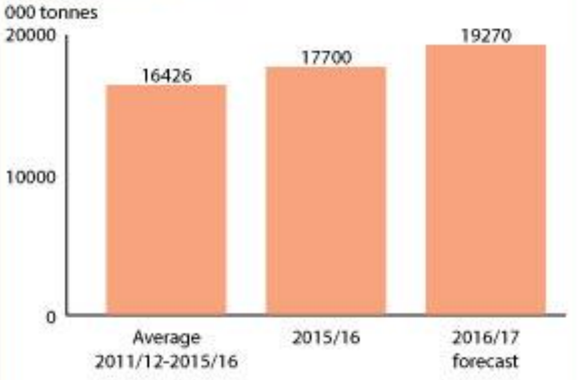
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	22,199	24,694	25,746	4
Sorghum	6,551	5,195	5,909	14
Wheat	3,530	3,711	3,784	2
Others	1,103	1,121	1,121	0
Total	33,384	34,721	36,560	5

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

Mexico

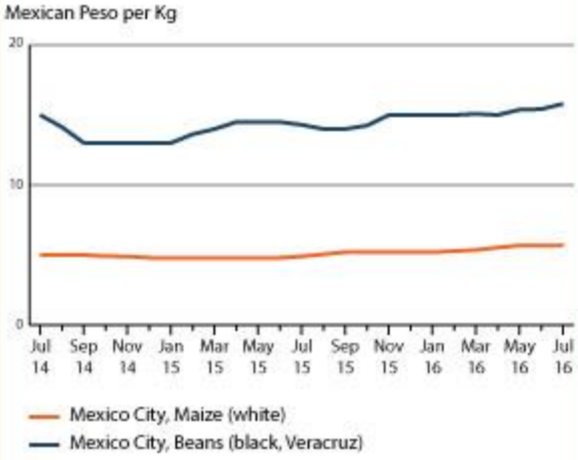
Total cereal imports



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

Mexico

Wholesale prices of maize and beans



Source: Sistema Nacional de Información e Integración de Mercados

GIEWS Country Brief

Mexico

Reference Date: 22-January-2015

FOOD SECURITY SNAPSHOT

- **White maize production in 2014 to reach record levels, wheat output to remain high**
- **Cereal imports in 2014/15 marketing year are expected to remain high**
- **White maize prices continued their decline in December, black bean prices unchanged**

White maize production in 2014 to reach record levels, wheat output to remain high

Harvesting of the 2014 main season maize crop, spring-summer, is well advanced. Early official estimates point to a 6 percent increase over last year's same season output. The increase reflects higher-than-expected yields which compensated for lower plantings in response to low prices at the beginning of the season. The 2014 maize aggregate (autumn-winter and spring-summer seasons) production is preliminarily estimated at a record level of almost 24 million tonnes.

Planting of the 2015 secondary season, autumn-winter, maize crop is currently underway and official estimates point to a sharp reduction in the area planted as a result of high carryover stocks following two consecutive years of good outputs.

The 2014 wheat output reached almost 3.7 million tonnes, or 5 percent above last year's level and the five-year average, mainly as a result of favourable weather conditions during the season which resulted in higher yields.

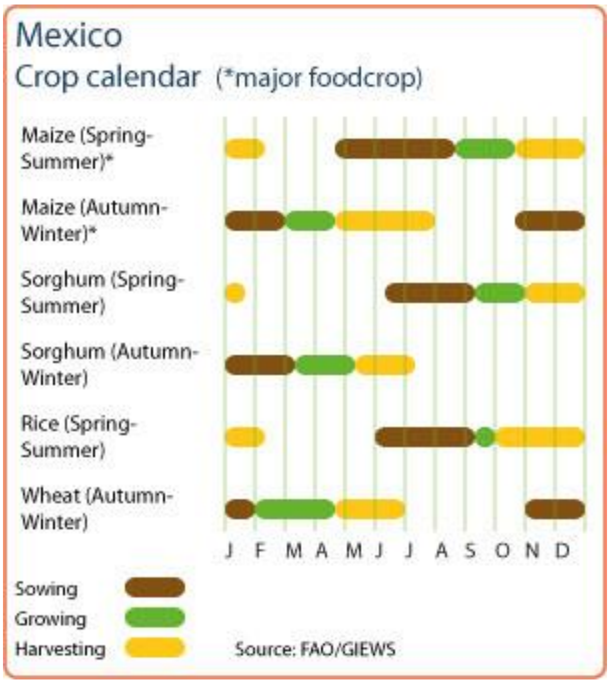
Cereal imports in 2014/15 marketing year are expected to remain high

Despite the high level of cereal production in 2014, official forecasts point to only a slight decline in cereal imports during the 2014/15 marketing year (October/September). Cereal imports are expected to reach 16 million tonnes or 3 percent below the high level of 2013/14 but still well above the country's five year average. High imports mainly reflect strong demand from the feed industry for yellow maize.

White maize prices continued their decline in December, black bean prices unchanged

White maize prices declined slightly for a third consecutive month in December 2014 and were at a four-year low. The declining trend reflects high supplies in the market and more recently the entry of new crop from the spring-summer 2014 harvest.

Black bean prices, by contrast, remained unchanged in December from their previous three months' level and were 6 percent below their year-earlier values.

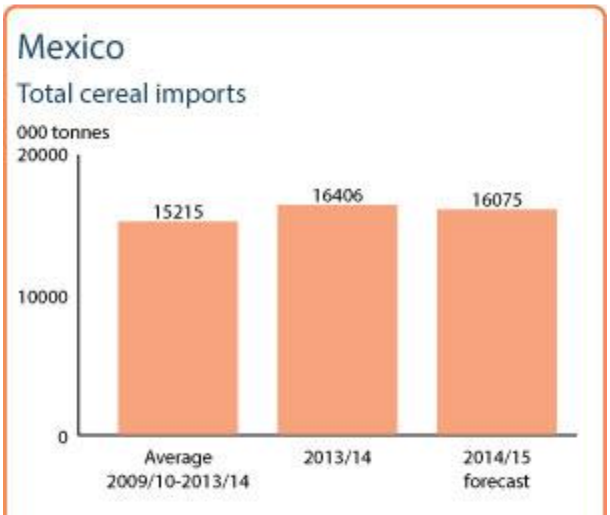


Mexico

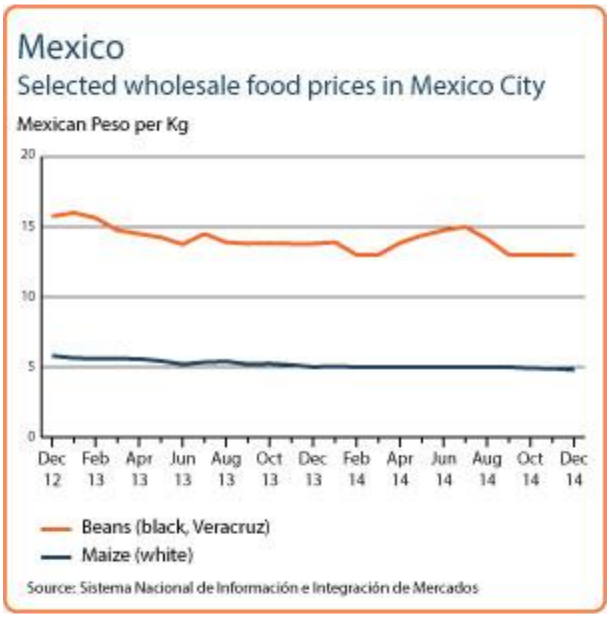
Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Maize	21,111	22,408	23,931	7
Sorghum	6,734	7,162	7,000	-2
Wheat	3,643	3,518	3,682	5
Others	1,026	1,073	1,093	2
Total	32,515	34,161	35,706	5

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



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


Mexico
Selected wholesale food prices in Mexico City
Mexican Peso per Kg
20
15
10
5
0
Dec 12
Feb 13
Apr 13
Jun 13
Aug 13
Oct 13
Dec 13
Feb 14
Apr 14
Jun 14
Aug 14
Oct 14
Dec 14
Beans (black, Veracruz)
Maize (white)
Source: Sistema Nacional de Información e Integración de Mercados

GIEWS Country Brief

Mexico

Reference Date: 7-November-2014

FOOD SECURITY SNAPSHOT
- Maize and wheat production in 2014 set to better last year's level
- Lower cereal imports forecast for 2014/15 marketing year (October-September), but levels still high
- Maize prices fell in October, while price of beans remained stable

Maize and wheat production in 2014 set to surpass last year's level

The 2014 spring-summer maize and wheat harvest is well under way. Despite a reduction in the area planted with maize, in response to low prices at planting time, the harvest is expected to be 6 percent larger than last year's, and close to a record. This reflects higher yields owing to good weather during the growing season. The latest official figures show that total maize production in 2014 (spring-summer and autumn-winter, already harvested) will be close to 24 million tonnes. The 2014 spring-summer wheat crop is forecast to be 4 percent below its 2013 equivalent, mainly reflecting lower yields during the season. Nonetheless, given the good results of the main 2014 autumn-winter harvest, total wheat production is likely to be nearly 3.7 million tonnes, about 4 percent above its 2013 and average level.

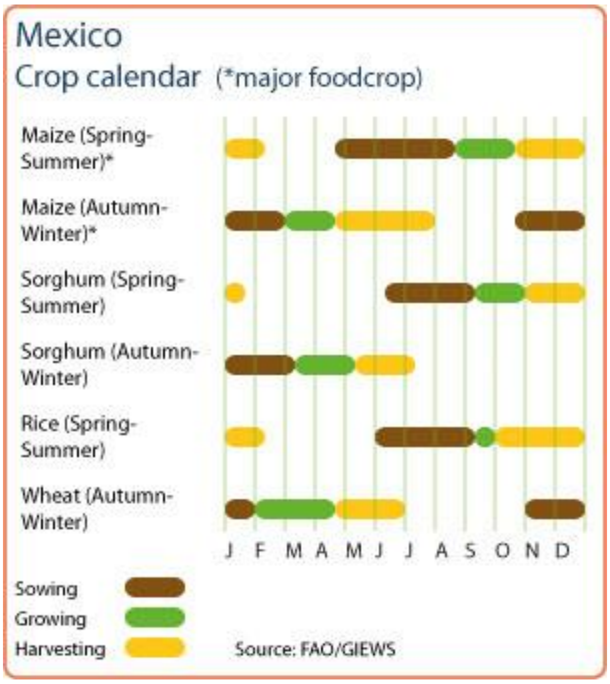
Lower cereal imports forecast for 2014/15 marketing year, but still above-average levels

Owing to the high levels of production in 2014, cereal imports for the 2014/15 marketing year (October/September) are projected down by 5 percent on the previous year's level. The steepest drop is expected in wheat, imports of which are set to fall by 13 percent. Maize imports (mainly yellow maize) are projected at 5 percent below their level in the 2013/14 marketing year, but still above the average of the last five years, owing to strong demand for animal feed.

Maize prices fall in October, but price of beans remains firm

After several months in which maize prices have remained stable at low levels, the price of white maize fell by nearly 2 percent in October, as the new harvest came on to the market. Maize prices are 6 percent below their October 2013 level.

The price of black beans was unchanged in October for the second straight month, having fallen in August. Prices are likely to fall further because most of the new harvest, which is currently under way and is forecast to be good, has yet to reach the markets. The price of beans in October was 6 percent below its level of a year earlier.

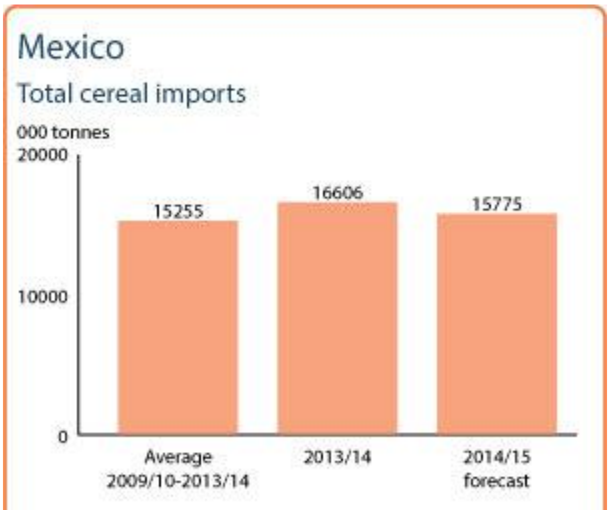


Mexico

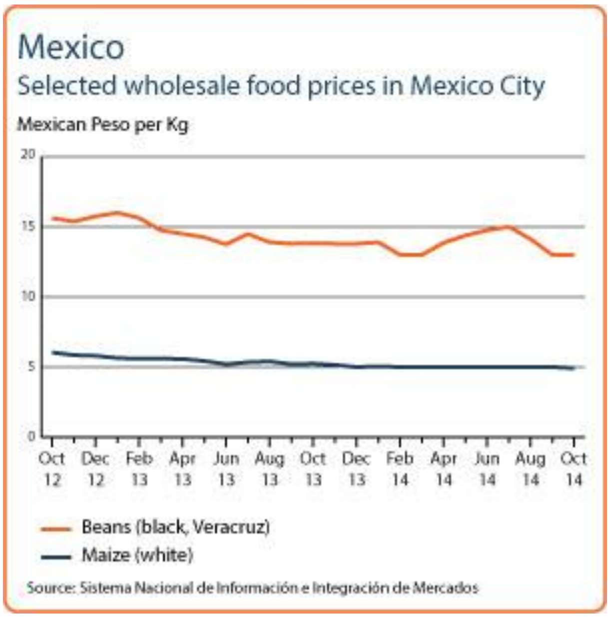
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	21,111	22,408	23,931	7
Sorghum	6,734	7,162	7,000	-2
Wheat	3,643	3,518	3,674	4
Others	1,026	1,073	1,093	2
Total	32,515	34,161	35,698	4

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



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


Mexico
Selected wholesale food prices in Mexico City
Mexican Peso per Kg
20
15
10
5
0
Oct 12
Dec 12
Feb 13
Apr 13
Jun 13
Aug 13
Oct 13
Dec 13
Feb 14
Apr 14
Jun 14
Aug 14
Oct 14
Beans (black, Veracruz)
Maize (white)
Source: Sistema Nacional de Información e Integración de Mercados

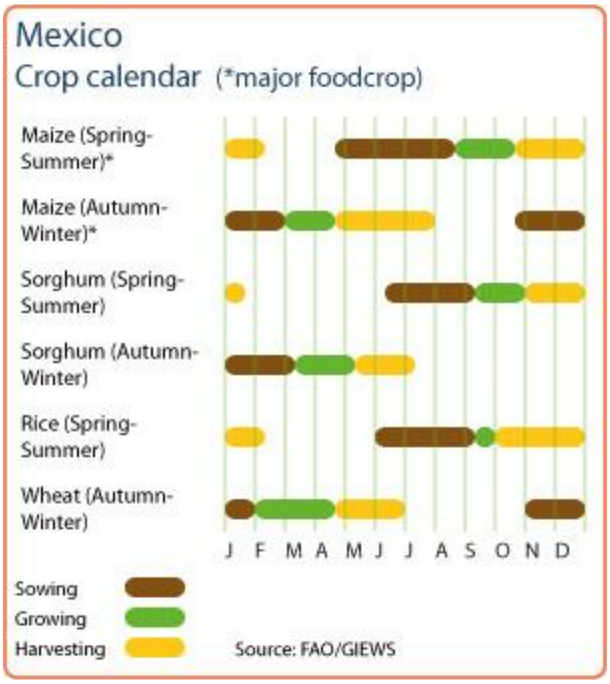
GIEWS Country Brief

Mexico

Reference Date: 27-May-2014

FOOD SECURITY SNAPSHOT

- The 2014 maize crop is forecast to remain relatively unchanged from last year
- Forecast for the 2014 wheat crop point to an increase from last year
- Cereal imports for the 2013/14 marketing year revised downward, but still remain high
- Maize prices unchanged in May, those of beans seasonally increased, but both at relatively low levels



The 2014 maize crop is forecast to remain relatively unchanged from last year

Harvesting of the 2014 autumn-winter is well underway. Initial estimates point to a sharp decline in production due to a 15 percent reduction in plantings, in response to low white maize prices. Preliminary estimates point to a production of 4.2 million tonnes, down 13 percent from the same season last year.

Planting of the 2014 main season "spring-summer" maize crop is well underway reflecting favourable weather conditions. Despite the record low price of white maize for human consumption, initial official forecasts point to an area planted of 6.6 million hectares, virtually unchanged from last year. This mainly reflects the substitution of area planted to white maize by yellow maize --used in the feed industry-- under the Government's promotion programme, which provides price subsidies of MXN 350/tonne for yellow maize. Assuming favourable weather for the remainder of the season and yields approaching historical levels, production of the main season maize crop is initially forecast at 18.2 million tonnes or 3 percent up from last year.

Aggregate 2014 maize production (autumn-winter and spring-summer season) is initially forecast at 22.4 million tonnes unchanged from last year and above the five-year average.

Mexico

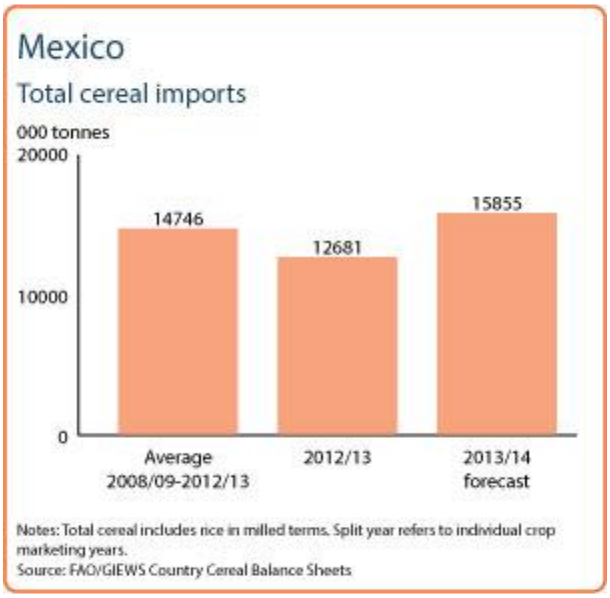
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	21,111	22,408	22,379	0
Sorghum	6,734	7,162	7,000	-2
Wheat	3,643	3,518	3,674	4
Others	1,032	1,103	1,123	2
Total	32,521	34,191	34,176	0

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

Forecast for the 2014 wheat crop point to an increase from last year

Harvest of the 2014 wheat crop is underway. Official forecasts point to an increase in production from last year of 2 percent to almost 3.7 million tonnes, mainly driven by higher plantings. However, at this level wheat production remains slightly below the country's five-year average for a second consecutive year.



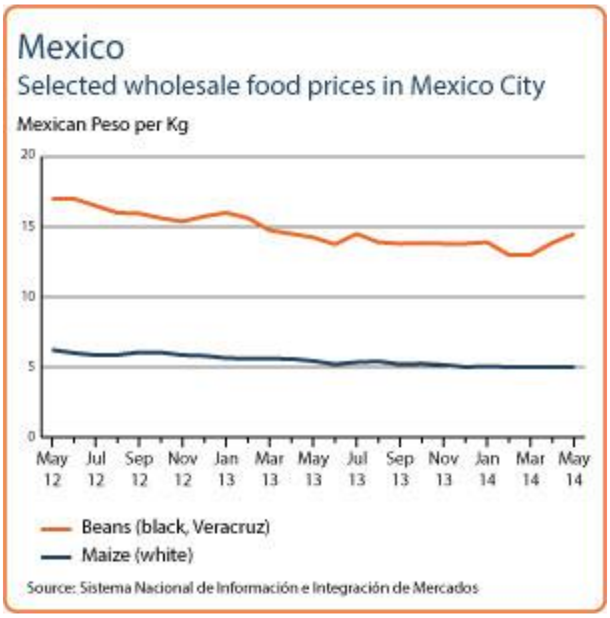
Cereal imports for the 2013/14 marketing year revised downward, but still remain high

Official forecasts for cereal imports in the 2013/14 marketing year (October/September) have been revised downward to reflect higher production of maize than earlier anticipated. However, cereal imports are expected to increase by 24 percent from the previous year's level, driven by strong demand from the feed industry and relatively low international prices.

Maize prices unchanged in May, those of beans seasonally increased, but both at relatively low levels

Prices were unchanged for the fourth consecutive month in May and at three-year lows. Prices mainly reflect the ample supplies in the market due to record harvests in the last three years.

In May, prices for black beans, the most produced and consumed variety, increased seasonally but remained close to their year-earlier levels. Similar to white maize, production of black beans has also followed an increasing trend in the last few years.



GIEWS Country Brief

Mexico

Reference Date: 24-February-2014

FOOD SECURITY SNAPSHOT

- The 2013 maize and wheat production estimated at high levels
- Cereal imports forecast to decline in 2012/13 marketing year
- Maize and bean prices remain at low levels

The 2013 maize and wheat production estimated at high levels

Harvesting of the 2013 spring-summer main season maize crop, which represents 70 percent of annual production, is concluded. As a result of larger plantings, good weather and higher yields, preliminary estimates point to an increase in production over the previous year's same season, especially in the main producing states of Jalisco, Mexico and Guanajuato. The 2013 autumn-winter maize crop, which was harvested in mid-2013, was estimated at above average levels. In aggregate, official preliminary estimates put the 2013 maize production (autumn-winter and spring-summer seasons) at 22.7 million tonnes, about 3 percent up from the 2012 crop and above the five-year average.

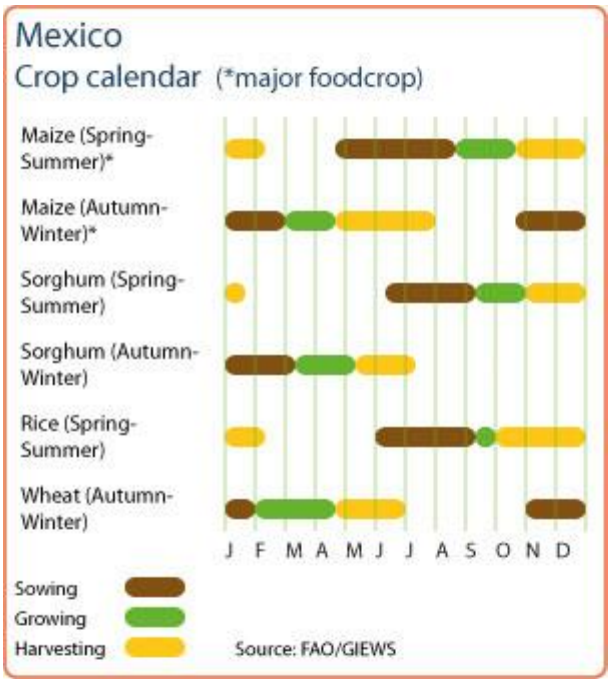
Harvesting of the 2013 spring-summer secondary wheat crop is also concluded. Production is estimated significantly higher than last year same season. The increase reflects optimal weather conditions which resulted in improved yields. The 2013 irrigated autumn-winter wheat crop, which accounts for more than 90 percent of annual production, was also estimated good due to higher plantings and yields. Official estimates for 2013 indicate a 2013 aggregate wheat production of 3.4 million tonnes or 5 percent up from 2012.

Cereal imports to increase in 2013/14 marketing year

Early forecasts for cereal imports in the 2013/14 marketing year (October/September) point to an increase of 11 percent from the previous year. This mainly reflects an increase in yellow maize imports driven by strong demand from the feed industry and low international prices. By contrast both white maize and wheat imports are forecast to decline reflecting the good prospects for this year's harvest.

Maize and bean prices remain at low levels

Prices for white maize remained unchanged in January and were at very low levels comparing with January 2013. The low prices are being driven by ample supplies in the market after two consecutive years of good harvests. In response to the declining trend in white maize prices the Government of Mexico has reinstituted import tariffs of 20 percent, for white maize from countries with which it does not have a free trade agreement—mainly affecting South Africa. Reflecting the high supplies of white maize, maize tortilla prices (a main

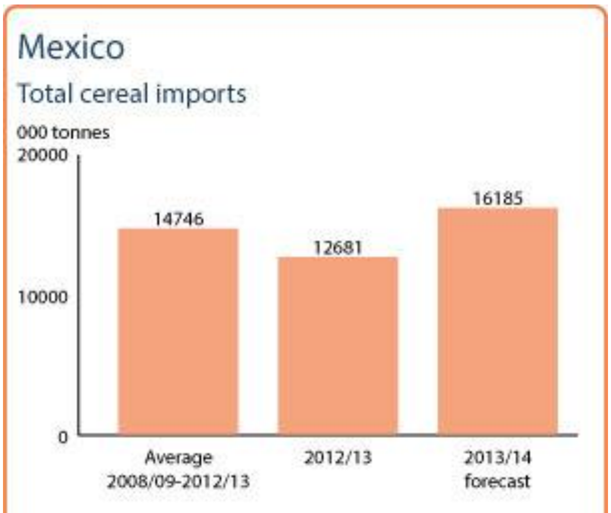


Mexico

Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	21 512	22 069	22 700	3
Sorghum	6 620	6 970	7 162	3
Wheat	3 782	3 274	3 423	5
Others	1 045	1 330	1 103	-17
Total	32 959	33 643	34 388	2

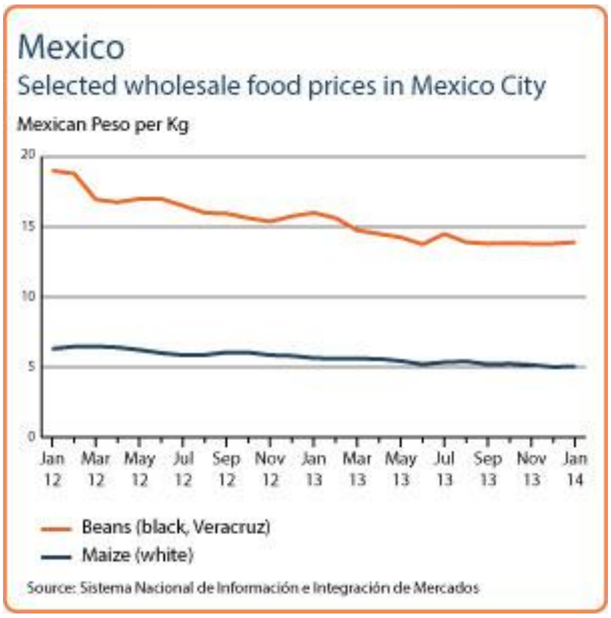
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

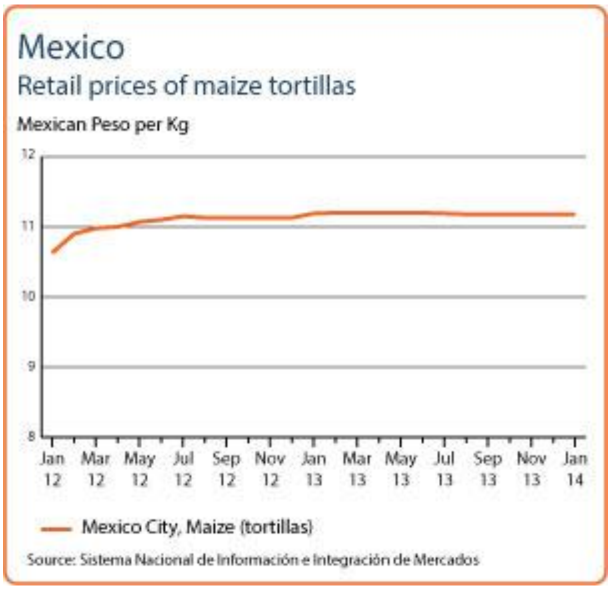


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

component of the local diet) remained unchanged from a month ago and at the same level as in January 2013.

Similar to white maize, bean prices have been declining over the last two years in response to good productions. In January prices remained unchanged and 13 percent lower than in January 2013, reflecting the ample supplies in the market.





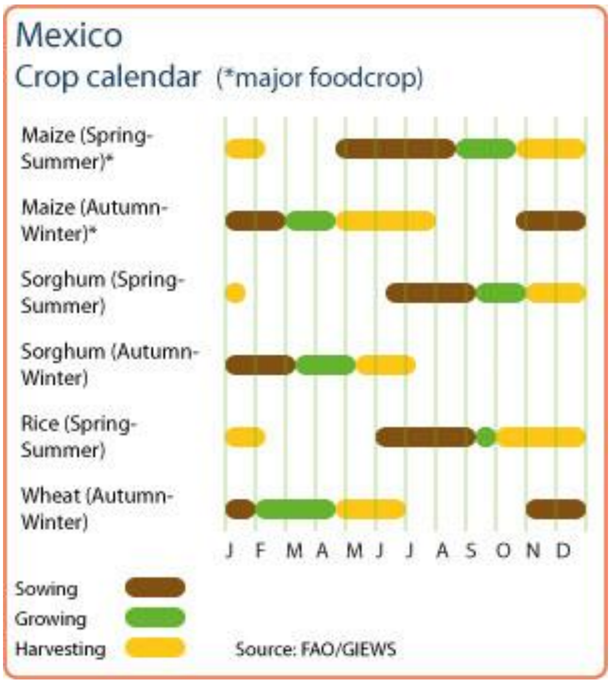
GIEWS Country Brief

Mexico

Reference Date: 14-November-2013

FOOD SECURITY SNAPSHOT

- The 2013 maize and wheat production expected at good levels
- Cereal imports forecast to decline in 2012/13 marketing year
- Maize and bean prices at low levels



The 2013 maize and wheat production forecast at high levels

Harvesting of the 2013 spring-summer main season maize crop, which represents 70 percent of annual production, is underway and preliminary estimates point to an output of 17.6 million tonnes, 6 percent above the good crop of the same season in 2012, reflecting both higher plantings and yields , especially in the main producing states of Jalisco, Mexico and Guanajuato. The 2013 autumn-winter maize crop, which was harvested earlier in the year, has been revised upwards to 5.2 million tonnes, which is still 5 percent below last year's good crop. The reduction in output for the 2013 secondary season maize was due to reduced levels of water reservoirs, especially in the Sinaloa region. Official forecasts point to an aggregate 2013 maize production (autumn-winter and spring-summer seasons) of 22.8 million tonnes, about 3 percent above the 2012 crop and slightly up from the five-year average.

Harvesting of the 2013 spring-summer secondary wheat crop is well underway and the output is anticipated almost 19 percent higher than in 2012. The increase reflects optimal weather conditions which resulted in higher yields. The 2013 irrigated autumn-winter wheat crop, which accounts for more than 90 percent of annual production, was harvested in July and was 4 percent up from last year's reduced level. Early estimates for 2013 point to a total wheat production of 3.4 million tonnes or 5 percent up from 2012.

Mexico

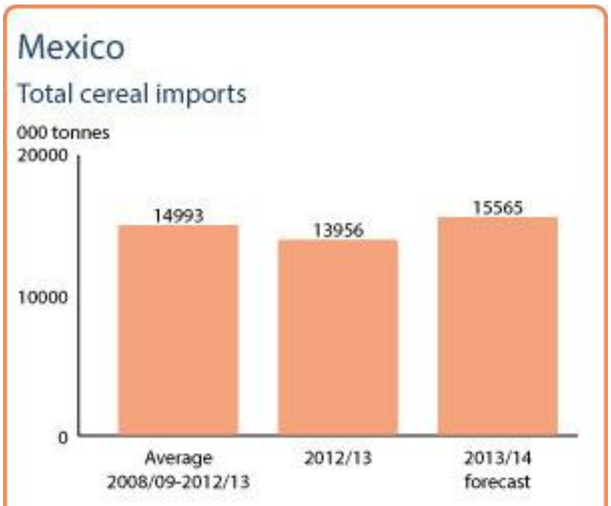
Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	21,512	22,069	22,400	1
Sorghum	6,620	6,970	7,162	3
Wheat	3,782	3,274	3,423	5
Others	1,049	1,351	1,113	-18
Total	32,963	33,664	34,098	1

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

Cereal imports to increase in 2013/14 marketing year

Early forecasts for cereal imports in the 2013/14 marketing year (October/September) point to an increase of 11 percent from the previous year. This mainly reflects an increase of 14 percent in maize imports to 8 million tonnes in order to satisfy the strong demand from the feed industry. By contrast, wheat imports are forecast to decline by 10 percent from the previous year, following the higher production levels expected for 2013.

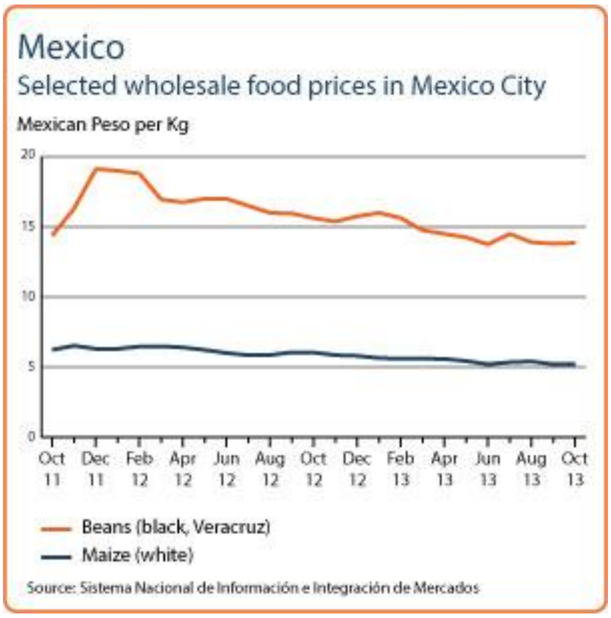


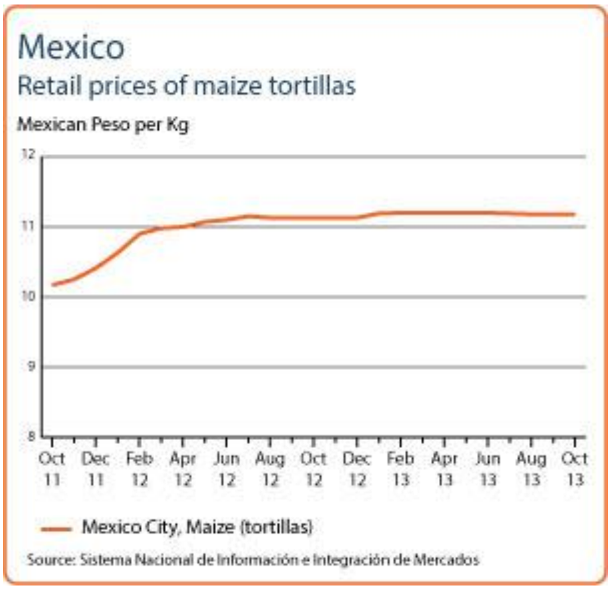
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Maize and bean prices remain at low levels

Prices of white maize remained fairly stable in October at MXN 5.20 (USD 0.40), and were some 14 percent below their levels of a year earlier. Prices of *tortilla*, a traditional component of the local diet made out of white maize flour, stayed virtually unchanged at of MXN 11.18 (USD 0.84). Favourable prospects for the 2013 maize crop and a good secondary maize harvest contributed to keep prices stable.

Prices of staple beans remained also unchanged in October and were almost 12 percent lower than their levels a year earlier, reflecting ample supplies from last year's good production.





GIEWS Country Brief

Mexico

Reference Date: 17-September-2013

FOOD SECURITY SNAPSHOT

- 2013 Maize production firm at last year's good levels
- Cereal imports estimated to decline in 2012/13 marketing year
- Maize and bean prices remain at low levels

2013 maize production firm at last year's good levels

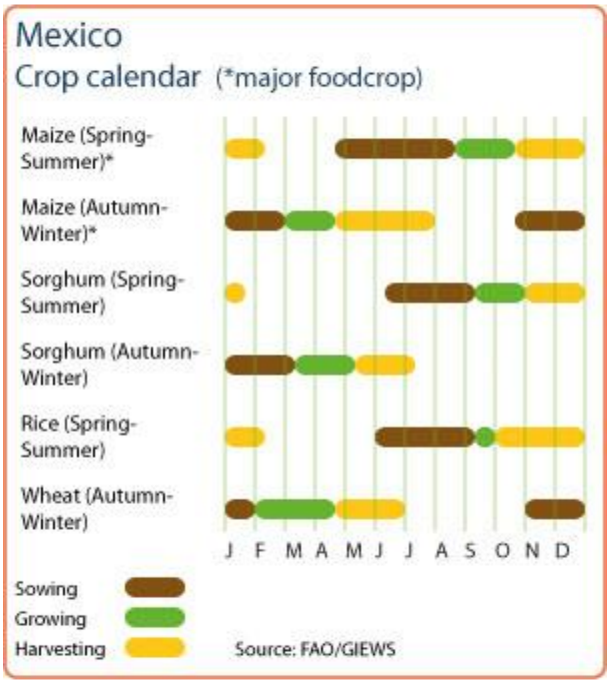
Harvesting of the 2013 autumn-winter maize crop was completed in August and the output is estimated at about 4.8 million tonnes, about 13 per cent below the good crop of the same season in 2012 due to the reduced levels of water reservoirs, especially in the main producing state of Sinaloa. Sowing of the 2013 main spring-summer season maize crop, which represents 70 percent of the annual production, has just been completed under generally favourable weather conditions, where good levels of humidity in the soil benefited the planting season. Early official forecasts point to an output of 17.6 million tonnes, 6 per cent up from the 2012 same season. This mainly reflects an increase in the area planted and Government support programmes providing input subsidies and credit facilities. In May, the Government approved a five-year National Development Plan, which includes as one of its primary objectives the promotion of the agricultural sector.
In aggregate, the 2013 maize production (autumn-winter and spring-summer seasons) is expected at 22.4 million tonnes, slightly above the 2012 crop and the average of the past five years.
Harvesting of the 2013 irrigated autumn-winter wheat crop, which accounts for 90 percent of annual production, was completed in July. The output was estimated at 3.7 million tonnes, 13 percent higher than in 2012, reflecting an increase in plantings from last year's reduced levels in the main producing area of Sonora.
Planting of the 2013 minor rice crop was completed. Production forecast to fall some four percent from last year to 178,000 tonnes as a result of a reduction in total planted area.

Cereal imports estimated to decline in 2012/13 marketing year

Imports of cereals in the 2012/13 marketing year (October/September) are expected to decline by about 19 percent from the 2011/12 levels to some 14 million tonnes, mainly reflecting the recovery in the 2012 maize production.

Maize and bean prices remain at low levels

In the capital Mexico City, prices of staple beans have declined in the past six months and in August were 13 per cent lower than their levels a year earlier, reflecting ample supplies from last year's good production. Reflecting the good 2012 main season harvest, prices of white maize remained

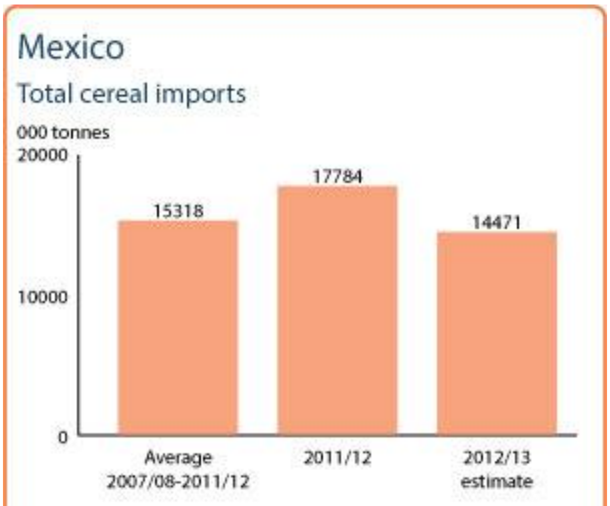


Mexico

Cereal production

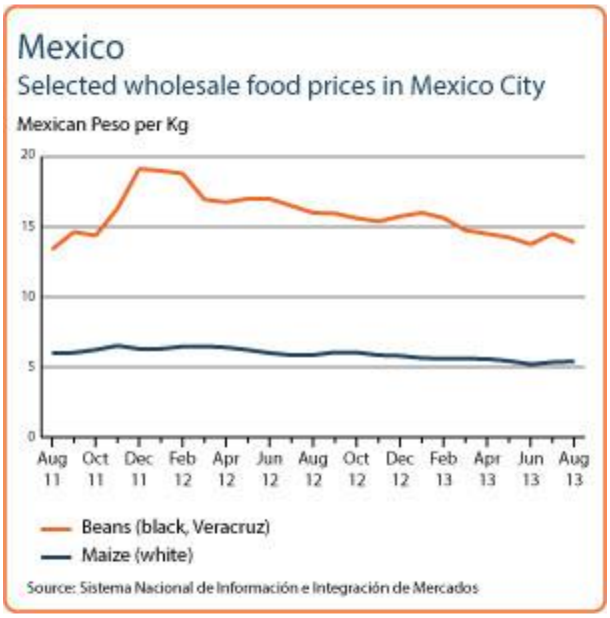
	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	21,512	22,069	22,400	1
Sorghum	6,628	7,010	7,000	0
Wheat	3,782	3,274	3,750	15
Others	1,049	1,351	1,113	-18
Total	32,971	33,704	34,263	2

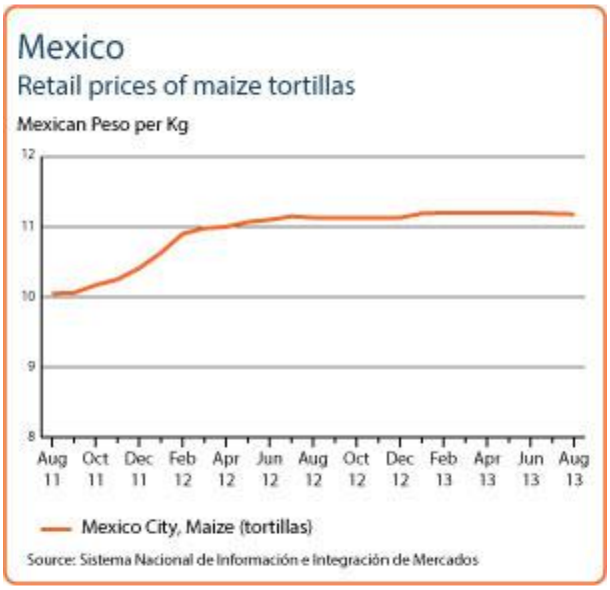
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



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

fairly stable and at low levels in August at MXN 5.40 (USD 0.40), some 8 per cent below their levels a year earlier. Prices of *tortilla*, a traditional component of the local diet made out of maize flour, stayed virtually unchanged at a relatively high level of MXN 11.18 (USD 0.84).





GIEWS Country Brief

Mexico

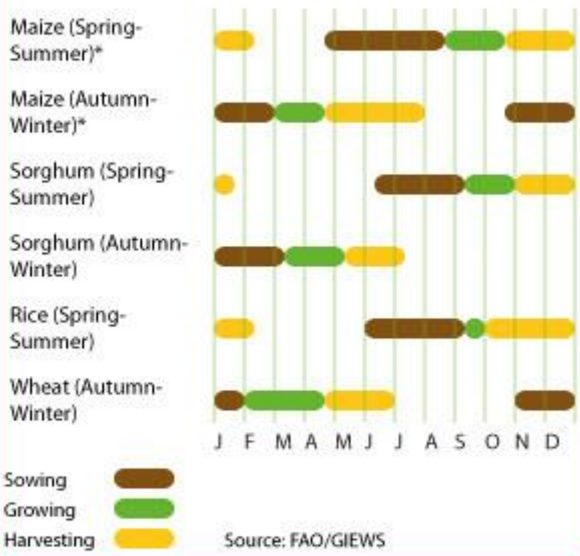
Reference Date: 15-April-2013

FOOD SECURITY SNAPSHOT

- Favourable production prospects for the 2013 maize crop
- Cereal imports expected to decrease in 2012/13 (October/September)
- Maize and bean prices lower than a year earlier

Mexico

Crop calendar (*major foodcrop)



Favourable production prospects for the 2013 maize crop

Planting of the 2013 spring-summer main season maize crop - which represents 70 percent of annual production - has begun. Early indications point to an increase in the planted area. Concurrently, harvesting of the 2013 autumn-winter crop has begun and latest official forecasts point to an output of about 4.8 million tonnes, 10 percent lower than the same season in 2012. Frosts in mid-January had negatively affected crops in the main growing areas of Sinaloa. However, assuming normal weather conditions in the coming months, total maize production in 2013 (autumn-winter and spring-summer seasons) is tentatively forecast at 22.4 million tonnes, slightly above the 2012 season and 4 percent higher than the previous five-year average. The expected increase reflects increases in planted area and the production subsidies adopted by the Government under its production support programme known as PROCAMPO.

Harvesting of the 2013 irrigated autumn-winter wheat crop - which accounts for 90 percent of annual production - has just begun. Production is forecasted at 3.8 million tonnes or 16 percent higher than in 2012. The increase reflects a recovery in the planted area from last year's reduced level and favourable weather conditions during the growing season.

Mexico

Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes			percent
Maize	21,465	21,836	22,400	3
Sorghum	6,628	7,010	7,000	0
Wheat	3,774	3,233	3,750	16
Others	1,049	1,351	1,093	-19
Total	32,916	33,430	34,243	2

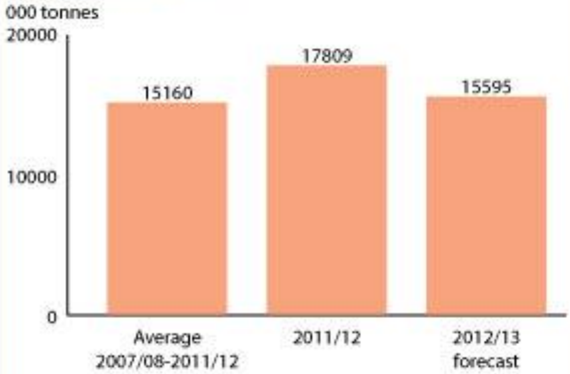
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Cereal imports expected to decline in 2012/13 marketing year

Following the strong recovery of cereal production in 2012 from the previous year, import requirements for the 2012/13 marketing year (October/September) are anticipated to decline by about 12 percent from their 2011/12 levels to nearly 16 million tonnes.

Mexico

Total cereal imports

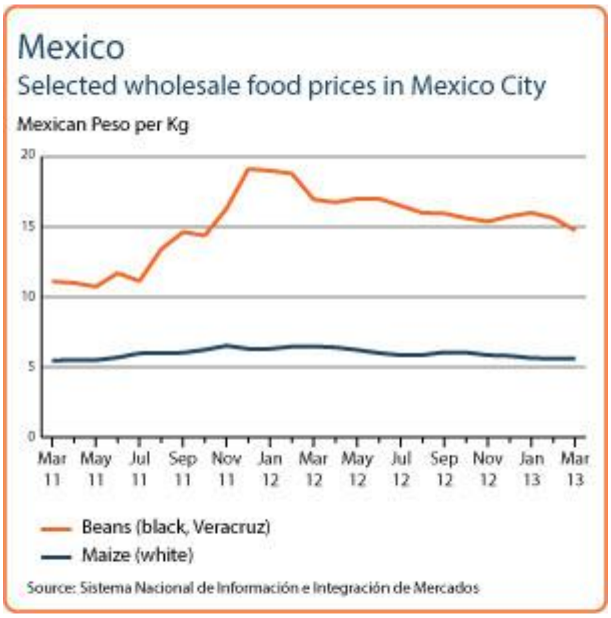


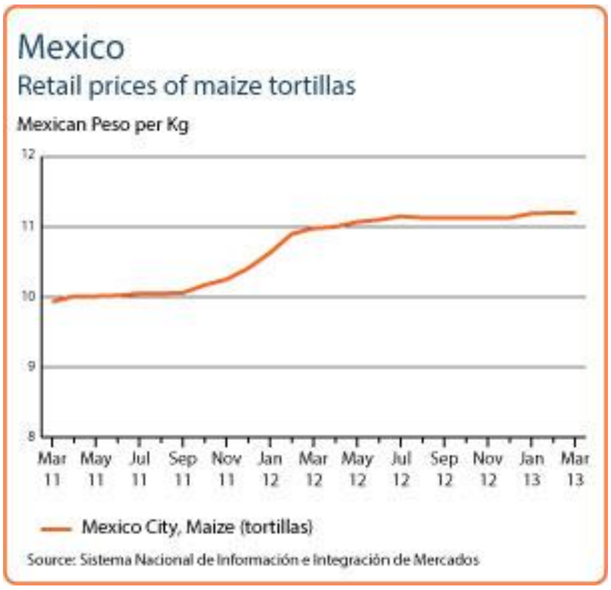
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Maize and bean prices lower than a year earlier

Prices of maize and beans had been generally declining in response to the favourable 2012 main season harvests. In the capital Mexico City, prices of white maize remained stable in March 2013 and were lower than at the same month last year, Prices of *tortilla*, a traditional component of the local diet made out of maize flour, stayed unchanged at their record highs in February of MXN 11.20 (USD 0.89) per kg, mainly due to high production and transport. Prices of black beans, another staple in the country, declined in the past few months with the

2013 autumn-winter harvest and in March were at MXN 14.75 per kg, or 13 percent below their levels a year earlier.





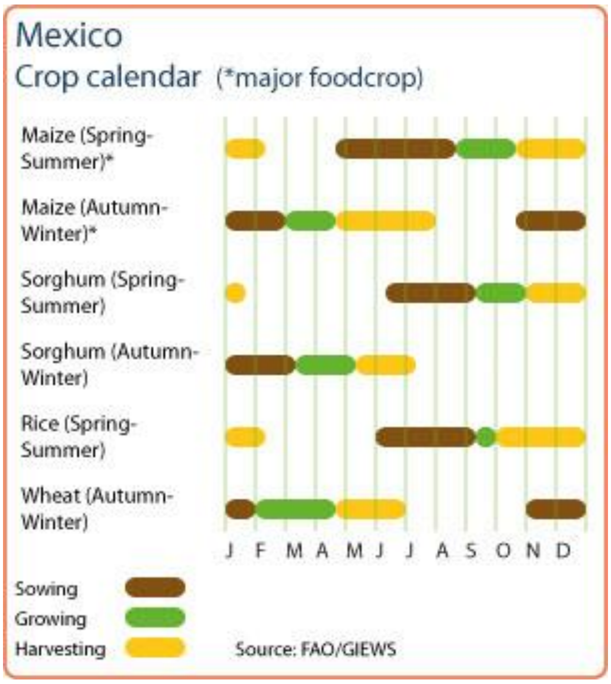
GIEWS Country Brief

Mexico

Reference Date: 29-August-2012

FOOD SECURITY SNAPSHOT

- The 2012 maize output forecast to recover from last year's reduce level
- Significant increase in cereal imports in 2011/12 (October/September)
- White maize prices declining



The 2012 maize output forecast to recover from last year's reduced level

Sowing of the 2012 spring-summer main season maize crop, which represents more than 70 percent of the aggregate annual production, is near completion. The area planted is preliminary estimated to be near the good level of last year and assuming normal growing conditions in the coming months, this season's output is officially forecast at some17 million tonnes, 30 percent above the drought-reduced 2011 crop. Harvesting of the 2012 autumn-winter crop is completed and the output is estimated at 5.5 million tonnes, about 25 percent above the poor crop of the same season in 2011. This reflects higher than anticipated plantings, particularly in the key growing areas of Sinaloa and Veracruz and a recovery in yields. The aggregate production in 2012 (autumn-winter and spring-summer seasons) is forecast at 22 million tonnes, 26 percent above the 2011 reduced level, and close to the average of the past five years. Production this year was supported by several measures adopted by the Government including subsidies to inputs and interventions to improve water availability.

Harvesting of the 2012 irrigated autumn-winter wheat crop, which accounts for 90 percent of the annual production, was completed in June. The 2012 aggregate (autumn-winter and spring-summer seasons) wheat output is estimated at 3.3 million tonnes, 9 percent below its level in 2011, mainly reflecting lower plantings in the key producing areas of Sonora, Baja California and Guanajuato.

Mexico

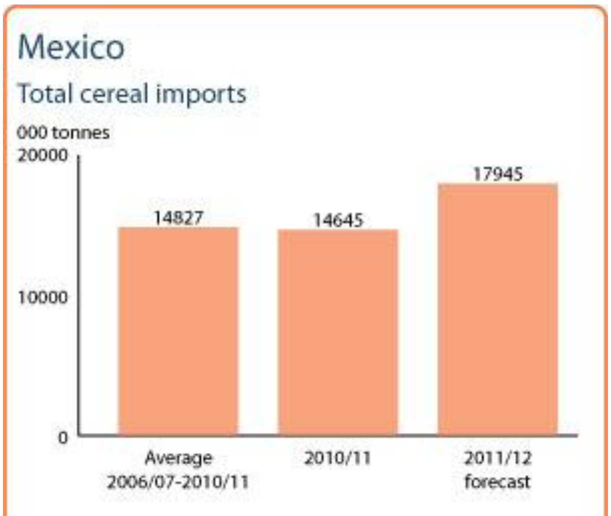
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Maize	21 801	17 635	22 296	26
Sorghum	6 467	6 429	7 100	10
Wheat	3 831	3 628	3 275	-10
Others	987	809	1 161	44
Total	33 085	28 501	33 832	19

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

Cereal imports on the increase in 2011/12

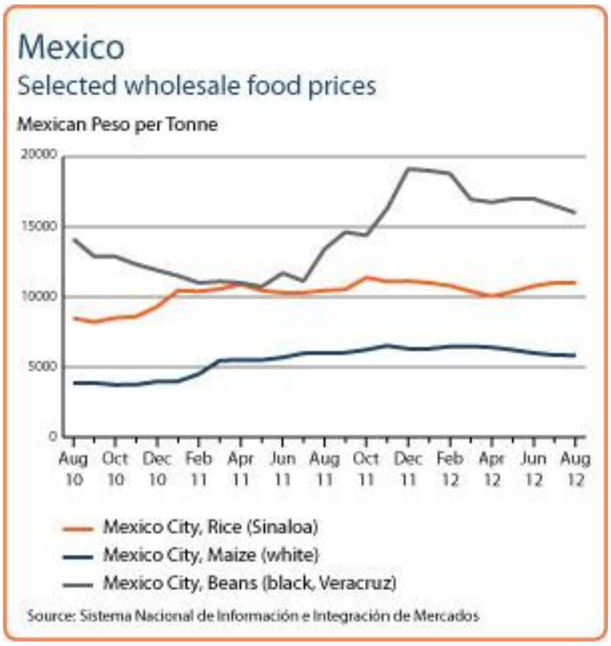
Given the lower cereal production obtained in 2011, imports in the 2011/2012 marketing season (October/September) are forecast to reach about 18 million tonnes, up by 22 percent on the 2011 levels.

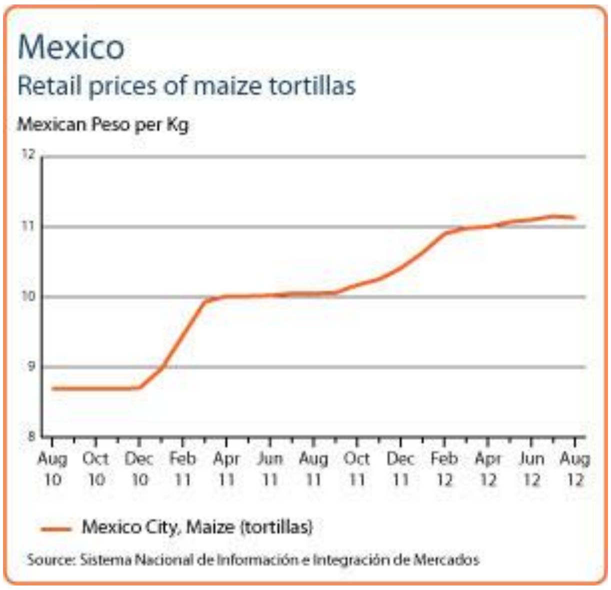


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

White maize prices decline

White maize prices have decreased in the past months with the arrival into the markets of the 2012 secondary harvest and in the first three weeks of August wholesale prices averaged some 3 percent below their levels a year earlier. Prices of maize tortilla, a traditional component of the local diet, remained virtually unchanged in the past three months but in August were 11 percent above their levels of a year earlier. Prices of staple black beans have declined in the past two months following good availabilities from the recently completed autumn-winter season harvest. However, in the capital Mexico City, prices in August remained 19 percent above their levels at the same time a year earlier.





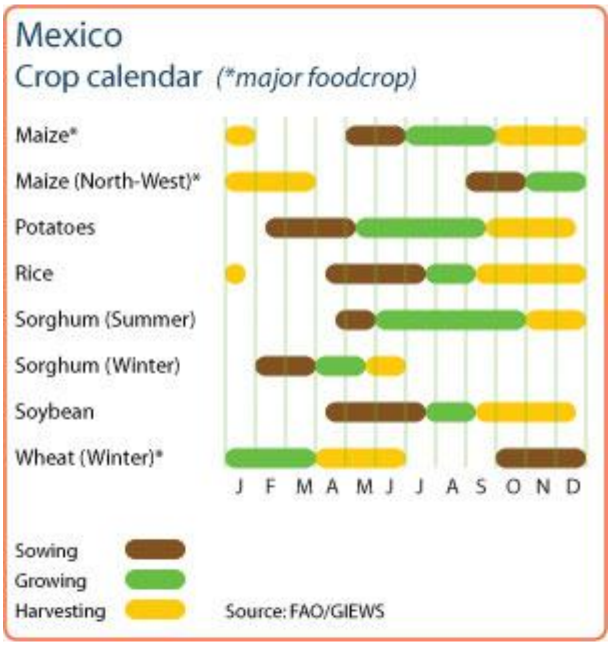
GIEWS Country Brief

Mexico

Reference Date: 03-May-2012

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2012 maize crop
- Significant increase in cereal imports in 2011/12 (October/September)
- White maize prices remain high



The 2012 maize output to recover from the reduced level of 2011

Sowing of the 2012 spring-summer main season maize crop, which represents about 70 percent of the aggregate annual production, is currently underway. The area planted is anticipated to increase from last year's same season level and assuming normal weather conditions in the coming months, this season's output is officially forecast at 16 million tonnes, 8 percent above the reduced 2011 crop. Harvesting of the 2012 autumn-winter crop is ongoing and the output is forecast at 5.8 million tonnes, about 30 percent above the poor crop of the same season in 2011. This mainly reflects higher than anticipated plantings, particularly in the producing areas of the south. The aggregate production in 2012 (autumn-winter and spring-summer seasons) is forecast at 21.8 million tonnes, 14 percent above the 2011 crop affected by adverse weather, and close to the average of the past five years. In general, production this year is supported by several measures adopted by the Government including interventions to improve water availability, subsidies to inputs and credit facilities. In January, the Government signed a decree, with a budget of MXN 34 billion (USD 2.4 billion) to promote investment in the agriculture sector and mitigate the effects of the severe drought in 2011.

Harvesting of the 2012 irrigated autumn-winter wheat crop, which accounts for 90 percent of the annual production, is underway. The output is forecast at 3.6 million tonnes, marginally below its level in 2011 and 6 percent down from the average of the past five years. This is mainly the result of reduced levels of water reservoirs in the key producing areas of Sonora and Guanajuato.

Mexico

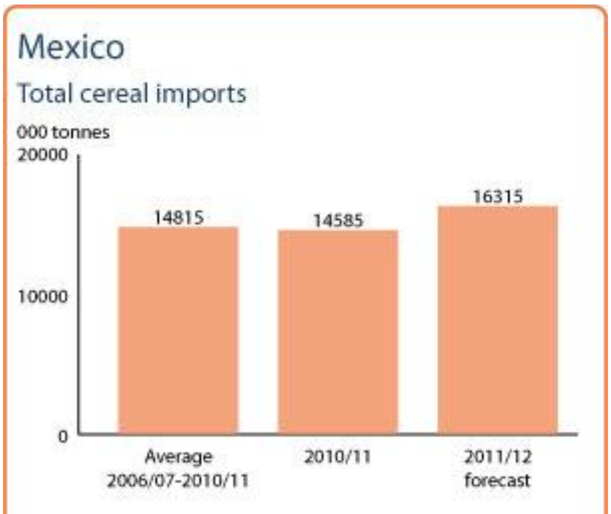
Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes			percent
Maize	22 114	19 200	21 800	14
Sorghum	6 521	6 700	6 400	-4
Wheat	3 835	3 651	3 600	-1
Others	1 042	1 048	990	-6
Total	33 511	30 599	32 790	7

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

Cereal imports on the increase

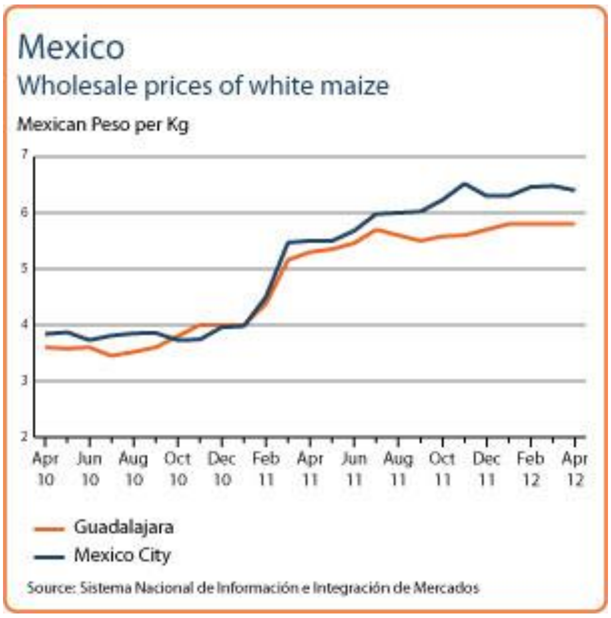
Given the lower cereal production forecast for 2011, import requirements for the 2011/2012 marketing season (October/September) are estimated at 16.3 million tonnes, up by 12 percent on the 2011 levels.

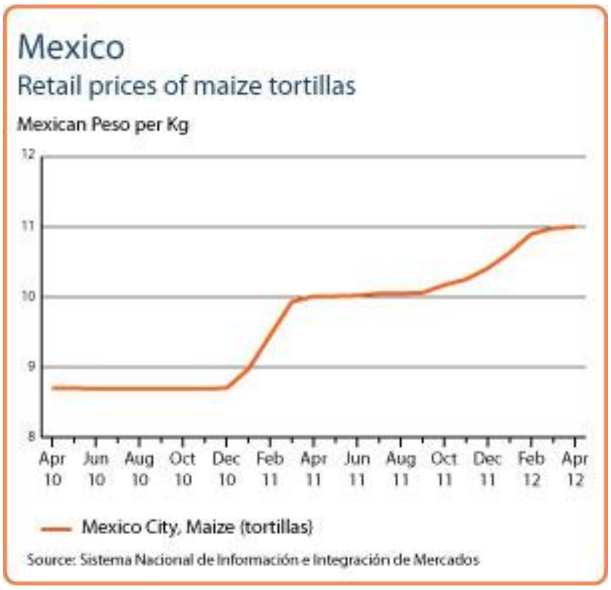


Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

White maize prices remain high

White maize prices remained firm and at high levels in the first months of 2012 and in April they were some 15 percent above their levels a year earlier. Prices of maize tortilla, a traditional component of the local diet, remained virtually unchanged in the past two months, but in April were 10 percent above their levels of a year earlier. Prices of staple black beans have declined in the past three months as a result of the ongoing harvest. Overall, however, in the capital Mexico City, prices in April remained well above their levels at the same time a year earlier.





GIEWS Country Brief

Mexico

Reference Date: 24-January-2012

FOOD SECURITY SNAPSHOT
- Reduction in maize sown area forecast for the 2012 secondary crop season
- Lower maize and sorghum production anticipated for 2011
- White maize prices still high

Area planted to 2012 secondary maize crop forecast to decrease sharply due to dry weather

Sowing of the 2012 autumn-winter season maize crop, which represent about 30 percent of the aggregate annual production, is currently under way. Sowing intentions are 14 percent down from last year's levels, owing to insufficient rainfall and low reservoir levels in states that produce under irrigation, particularly Sinaloa, but also Sonora, Baja California and Tamaulipas. Assuming sowing intentions are fulfilled, this season's production is forecast at 4.9 million tonnes 25 percent below the average of the last five years, although still above the poor crop of the same season in 2011, reduced by severe frosts.

Sowing of the 2012 irrigated autumn-winter wheat crop, which accounts for 90 percent of the annual production, is also underway. The output is tentatively forecast at 3.8 million tonnes, close to the high level obtained in the same 2010 season.

Maize and sorghum production down in 2011

The 2011 spring-summer crops are currently being harvested. Total production in 2011 (autumn-winter and spring-summer seasons) is forecast at around 20 million tonnes of maize and 6.4 million tonnes of sorghum, 9 percent below their 2010 levels in both cases. This reduction reflects crop losses and lower yields following heavy frosts in the autumn-winter season and a dry spell and frosts in September during the spring-summer season.

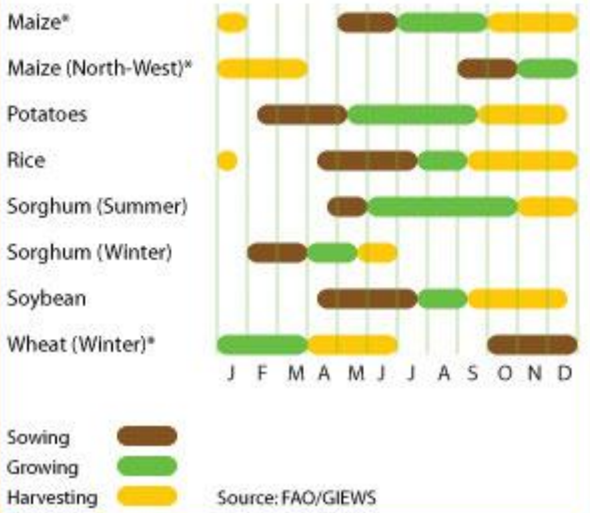
Higher cereal import needs

Given the lower cereal production forecast for 2011, import requirements for the 2011/2012 marketing season (October/September) are estimated at 15.4 million tonnes, up by 6 percent on the 2011 levels.

White maize prices still high

White maize prices remained stable in January but were about 50 percent above their January 2011 levels. This reflects crop losses in 2011 and unfavourable prospects for the 2012 autumn-winter cropping season. Prices of maize tortilla, a

Mexico
Crop calendar (*major foodcrop)



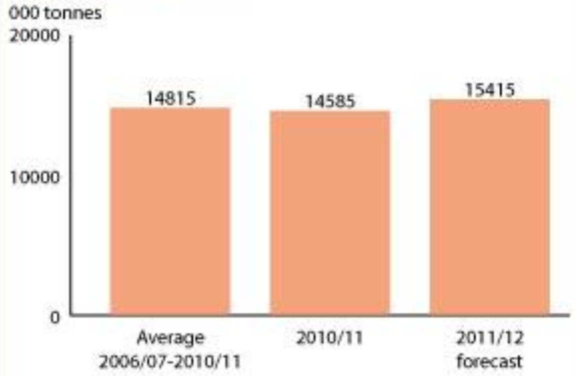
Source: FAO/GIEWS

Mexico
Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	22 471	22 394	20 400	-9
Sorghum	6 284	7 000	6 396	-9
Wheat	3 781	3 680	4 045	10
Others	1 104	1 035	1 048	1
Total	33 639	34 109	31 889	-7

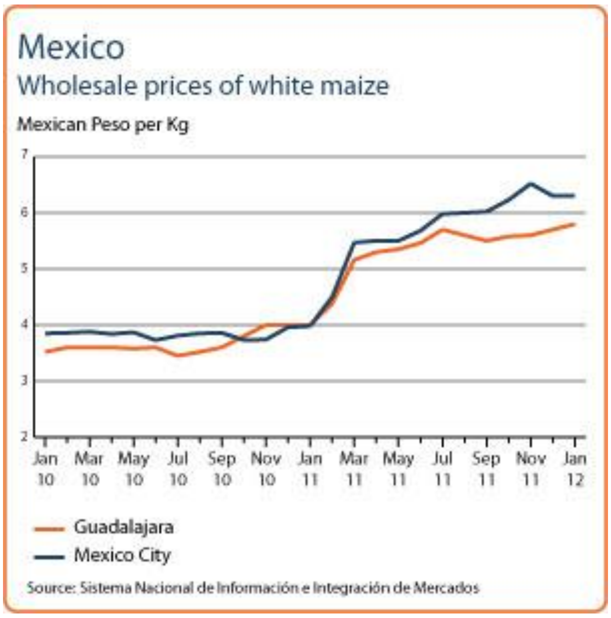
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

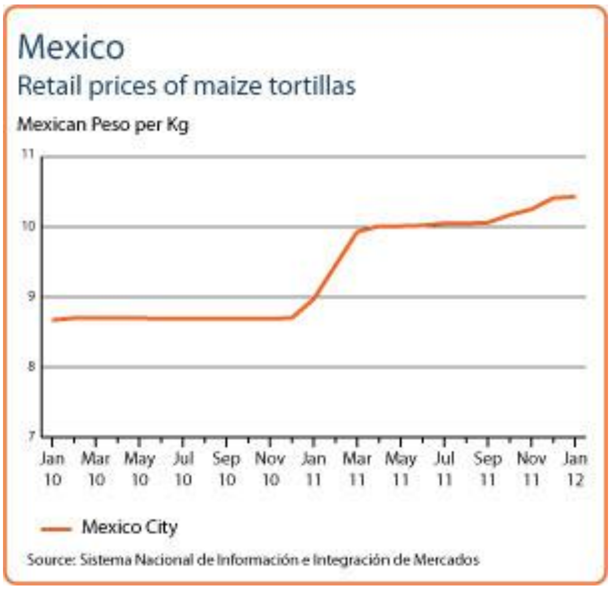
Mexico
Total cereal imports



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

traditional component of the local diet, have also risen, and in January were 16 percent above their levels of a year earlier.





GIEWS Country Brief

Mexico

Reference Date: 20-May-2011

FOOD SECURITY SNAPSHOT

- Reduction in total production of maize forecast in 2011
- Favourable prospects for wheat in 2011
- Prices of maize reach record levels

Reduced production of maize in 2011

Harvest of the 2011 autumn-winter maize season that represents 30 percent of the annual production is underway. The frosts in February led to substantial crop losses, particularly in the large producing areas of Sonora and Sinaloa. On a national level, it is estimated that 40 percent of the sown area was lost. Production should reach a level of 3.3 million tonnes, substantially lower than the level of last year.

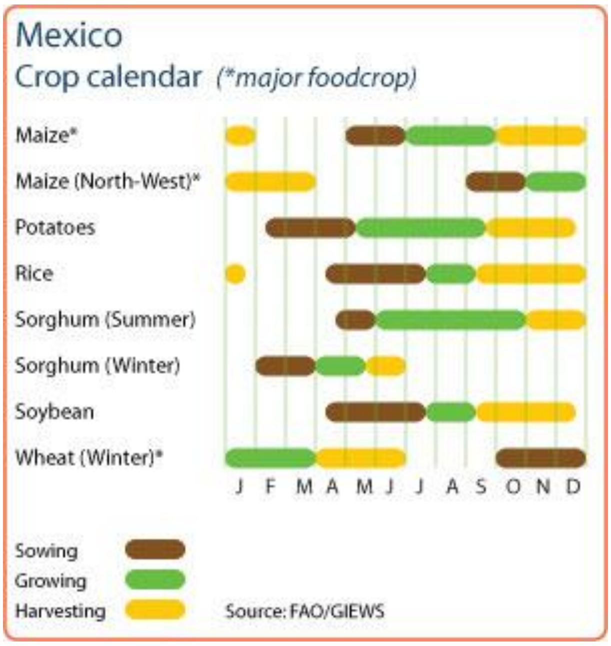
Sowing of the main 2011 spring-summer maize season has begun. The area sown for this season is estimated to be around the same as that for 2010 but more rainfall is needed in the next few weeks after the irregular and below-average rainfall last month. Assuming normal weather conditions during the season, total maize production (secondary and main harvests) is tentatively forecast to be 21.3 million tonnes, 5 percent lower than that of the year before as a result of the reduced autumn-winter harvest.

Favourable prospects for wheat in 2011

Harvesting of wheat of the 2011 autumn-winter crop season that represents 90 percent of the annual production is underway. The dry weather and above-average temperatures in recent months in the northeastern producing areas have favoured the development of the grain and its ripening. It is forecast that total wheat production in 2011 (main and secondary seasons) will be around 4 million tonnes, around 10 percent above 2010 and above the average in the last five years.

Prices of white maize at record levels

Prices of white maize have increased by around 40 percent since the beginning of the year, and in May, white maize in the markets of Mexico City was quoted at 5 500 Mexican pesos per tonne. The increase in the prices of maize is due to the crop losses from the frosts in February and the increasing trend of prices in the international market. The country imports 9 million tonnes of maize per year. In addition, prices of maize tortillas, a basic food product in the local diet, have increased since January 2011 and in May were 15 percent higher than a year ago.

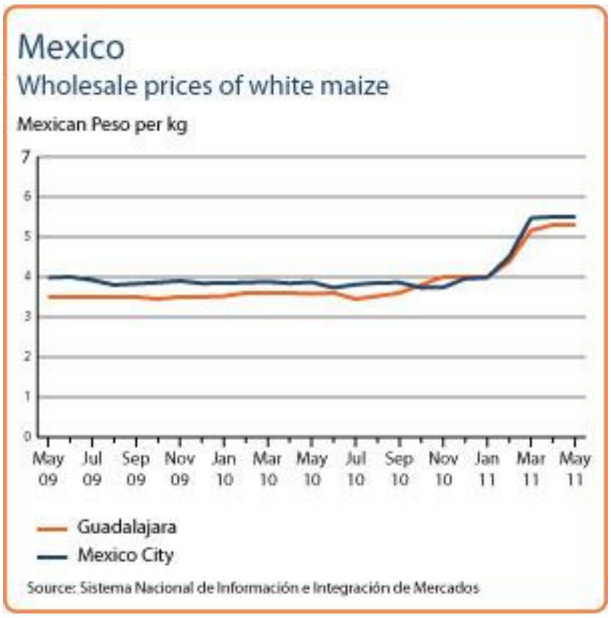


Mexico

Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	22 471	22 394	21 313	-5
Sorghum	6 284	7 000	6 396	-9
Wheat	3 781	3 680	4 045	10
Others	6 419	7 113	6 548	-8
Total	33 639	34 109	32 802	-4

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



GIEWS Country Brief

Mexico

Reference Date: 10-November-2010

FOOD SECURITY SNAPSHOT

- Bright prospects for the 2010 maize harvest
- Black bean prices have fallen but remain above prices two years ago

Main season maize is currently being harvested

The 2010 summer maize harvest is in progress and the prospects are good. Initial forecasts suggest a 2010 aggregate output (including the winter harvest which has already been gathered in) will be 4 percent above the high 2009 levels. These bright prospects are due to generally favourable weather conditions during the agricultural season. In most production areas in the south moderate rainfall in August and September benefited maize and other summer crops after several weeks of dry weather. In October the waning of the tropical storms reduced rainfall levels virtually throughout the whole country except for the southern coast on the Gulf of Veracruz and the Yucatán peninsula, where moderate to heavy rain had been falling since mid-May. The generally dry weather in October helped crops to mature at the beginning of the summer maize harvesting operations.

Sowing of the 2010/11 season wheat is in progress

The wheat for the 2010/11 harvest is currently being sown in the irrigated areas of the Northeast (Sonora and Sinaloa) under dry weather conditions, which are beneficial to working in the fields.

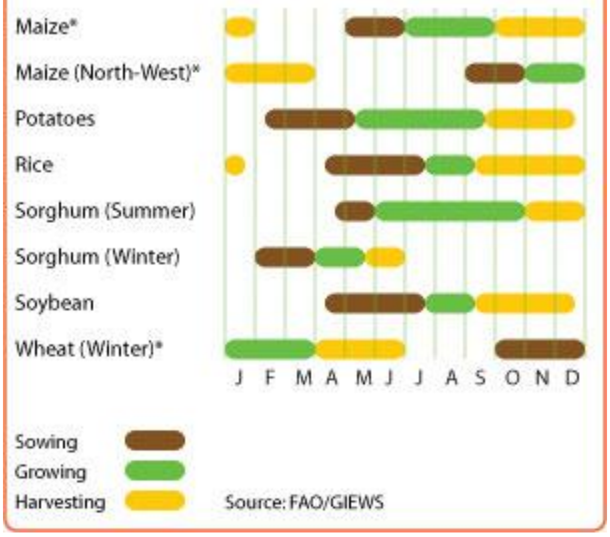
Aggregate wheat production in 2010 (the main winter and the secondary summer seasons) is estimated at 3.7 million tonnes, 10 percent below 2009's record levels, but still above the average of the past five years.

Bean prices are still above the level of two years ago

The prices of the black beans have fallen since the beginning of 2010 but they are still far higher than two years ago. In the second week of November on the Mexico City market black bean prices were around MXN 12.65/kg, 30 percent above November 2008 levels.

White maize wholesale prices have remained stable for almost 2 years.

Mexico
Crop calendar (*major foodcrop)

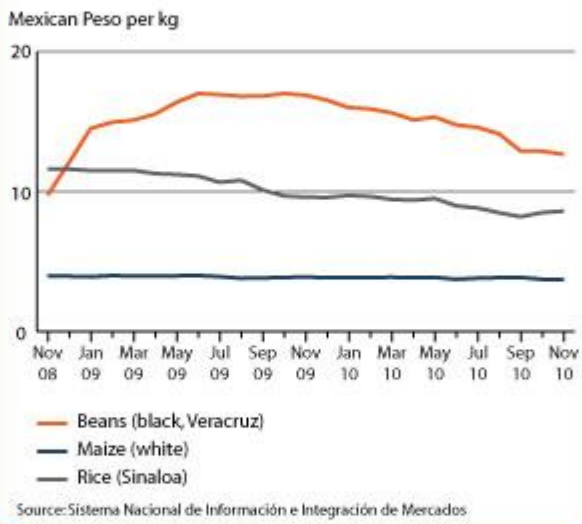


Mexico
Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	22260	23000	24000	4
Sorghum	5989	6200	5900	-5
Wheat	3621	4100	3700	-10
Others	1203	1152	1254	9
Total	33073	34452	34854	1

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

Mexico
Selected wholesale food prices in Mexico City



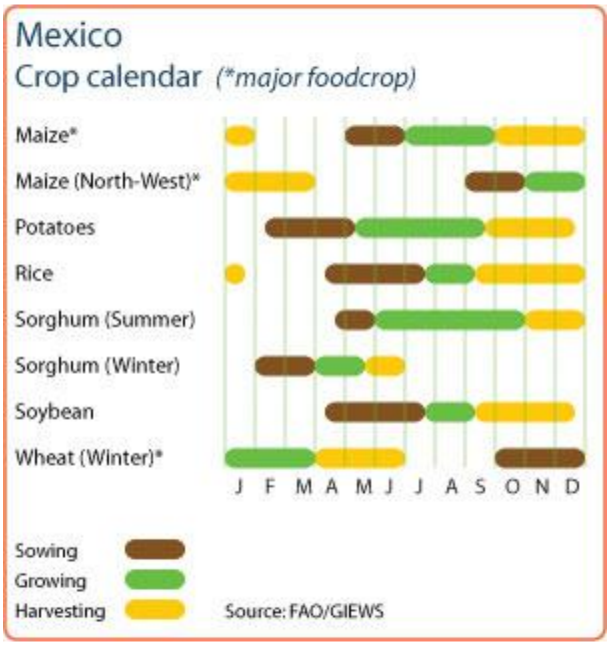
GIEWS Country Brief

Mexico

Reference Date: 25-August-2010

FOOD SECURITY SNAPSHOT

- Locally heavy rainfall affected winter coarse grain production
- Prices of main staples continue to decrease but beans price remains still 65 percent above the level of August 2008



Heavy rainfall affected the Caribbean state of Tamaulipas

The passage of the Hurricane Alex, towards the end of June, brought heavy rainfall mainly over the Caribbean state of Tamaulipas but also over the states of Nuevo Leon and Coahuila. Localized flooding has also affected southern Mexico following Tropical Storm Agatha. The Yucatan peninsula received good rains from mid-May in contrast to the drought conditions that persisted over the eastern states of Mexico in the driest May in the last five years.

On the other hand, dry conditions prevailed in the north-western states favouring harvesting of the winter wheat crop.

Winter crops harvesting concluded

Harvesting of the 2010 winter wheat crop is complete. Production prospects are favourable and early estimates indicate a 2010 aggregate wheat production (including the just planted secondary summer season crop) at a 10 percent lower level than the record output of 2009, but still above average.

Harvesting of winter sorghum is also complete. Heavy rains and water logging in the State of Tamaulipas, which accounts for more than 80 percent of Mexico's winter crops production, affected crops particularly the sorghum crop. Official sources indicate that almost 200 000 hectares have been affected by excess water resulting in yield losses and generally poor grains quality. However, the output reduction was lower than initially anticipated due to the harvest of large amount of sorghum before the passage of the hurricane.

Mexico

Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Maize	22260	23000	24000	4
Sorghum	5989	6200	5900	-5
Wheat	3621	4100	3700	-10
Others	1203	1150	1160	1
Total	33073	34450	34760	1

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

Prices of beans still well above the level of two years ago

Following a record level in January 2009, prices of black beans have started to decline, although still remaining well above the level of two years ago. In August 2010, black beans in Mexico City markets were traded at MXN 14.17/kg, about 65 percent above prices of August 2008, but about 15 percent below August 2009.

Despite some localized losses of grain production, wholesale prices of white maize in Mexico City markets continue to show a stable decreasing trend which has lasted almost throughout the last two years.

Rice prices have been declining gradually since May 2010 and in August 2010, prices were 25 percent lower than at the same time two years ago.

GIEWS Country Brief

Mexico

Reference Date: 08-April-2010

FOOD SECURITY SNAPSHOT

- Mostly dry weather dominates central farming states
- 2009 maize production performed below expectations
- Price of black beans declined but they are still 80 percent higher than two years ago

Drier than normal weather recorded in March

The first two months of 2010 recorded well above average rainfall covering most of the central farming states and parts of the north-eastern states. Pockets of drier than normal conditions were reported in the Yucatan peninsula and southern states. In March, drier conditions returned to most of the country with the exception of few central pacific areas.

Winter wheat harvesting is about to start

Harvesting of 2010 winter wheat crop is in progress and production prospects are favourable. Early estimates indicate a 2010 aggregate wheat production (including secondary summer season crop to be planted in May till August) similar to the good output of 2008 and 2009. The good expected result is also on account of efficient subsidizing schemes implemented by the government, such as the Forward Contract Program.

2009 summer maize harvest has been completed in February

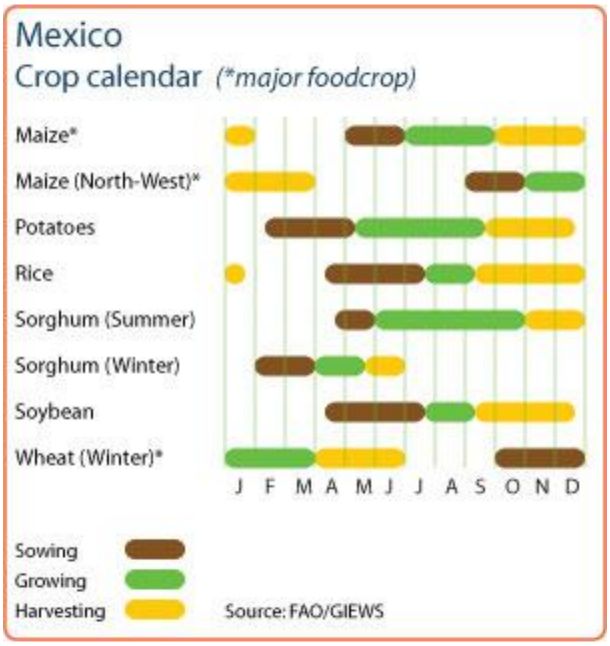
The summer maize harvest was recently completed. Estimates point to a 2009 aggregate production (winter and summer seasons) of approximately 23 million tonnes, 5 percent lower compared to previous year's record output, but still almost 5 percent above average level. In fact, severe drought conditions at the end of 2009 affected the last growing stages of the summer maize crop and the recently planted winter maize crop during the early growing stages. This resulted in irreversible yield losses and generally poor grains quality.

Production of 2009 summer sorghum was good, especially in the key producing state of Tamaulipas where yields are estimated to be above average. The dry weather conditions reported in 2009 spring-summer cropping cycle had a less severe impact on sorghum although reduced yields in some producing areas and decreased the overall production to 6.4 million tonnes (3 percent less compared to 2008 but higher than forecasts released at the beginning of the cropping season).

Planting of summer beans crops, scheduled to be harvested from September, has been completed in the main producing states of Zacatecas, Durango and Chihuahua. Under favourable weather conditions and also driven by attractive market prices for dry beans, production is estimated slightly above previous year's level.

Prices of beans still well above the level of two years ago

After reaching a record level in January 2009, prices of black beans



Mexico

Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Maize	21997	24321	23000	-5
Sorghum	6150	6611	6200	-6
Wheat	3265	4020	4100	2
Others	1259	1280	890	-30
Total	32671	36232	34190	-6

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

have started to decline, although remaining well above the level of two years ago. In April 2010, quotations for black beans in Mexico City market were at about MXN 15.5 /Kg, approximately 80 percent above prices of April 2008.

Despite some localized losses of grain production, wholesale prices of white maize in Mexico City markets continue to show a stable trend which has lasted almost throughout the last two years.

Rice prices have been declining since August 2009, reaching in April 2010 almost at the same level of two years ago.

GIEWS Country Brief

Mexico

Reference Date: 5-February-2010

FOOD SECURITY SNAPSHOT
- Precipitations return to central farming states
- 2009 maize production performed below expectations
- Rice prices stabilized at a level 30 percent higher than two years ago

After prolonged drought, in February precipitations returned to central farming states

During the month of November, the presence of hurricane Ida on the Yucatan peninsula together with some cold systems brought favourable precipitations to Yucatan and neighbouring states.

Elsewhere dry conditions persisted, especially in the North-East and in the central farming states of Michoacan, Jalisco and Guanajuato. In December, national aggregate precipitation levels were only 3.2 percent below the seasonal average, with favourable water deficit reductions in the North of Jalisco, South of Zacatecas and Aguascalientes. The central states remained dry and drought conditions were recorded in the northern territories of Chapas and South of Campeche.

During the first days of February, heavy rainfall levels have been reported in the states of Guanajuato and Michoacán and are expected to finally replenish soil moisture.

2009 summer maize production below expectations

The spring/summer maize harvest is complete in the central farming states but is still in progress in the North-western states. The total planted area is some 3 percent below last year's acreage.

The preliminary estimates for yields indicate that productivity was well below last year's level and almost 10 percent lower than the last five years' average.

Harvesting of 2009 summer sorghum crop is still underway and prospects for the output are good, especially in the key producing state of Tamaulipas where yields are expected to be well above normal levels.

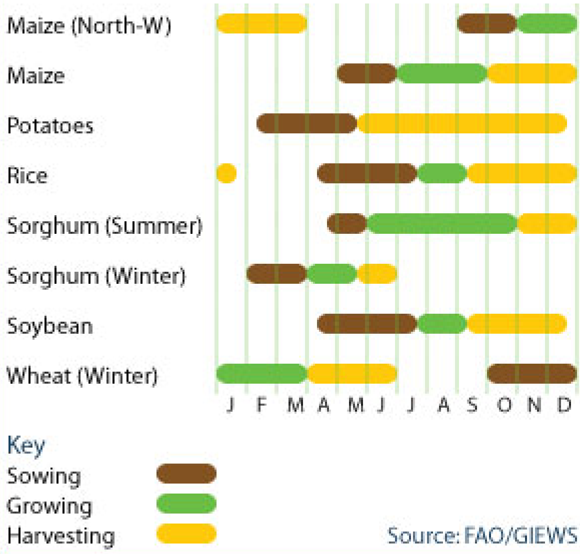
Winter wheat planting is underway

Planting of 2010 winter wheat, to be harvested from April-May, is still underway with some delays. Planting intentions for this cropping season point to a total acreage of approximately 380 000 hectares, 6 percent higher compared to the level of the winter cropping season of last year.

Prices of beans still well above the level two years ago

After the rising trend shown since November 2008, in Mexico City,

Crop calendar
Mexico



Source: FAO/GIEWS

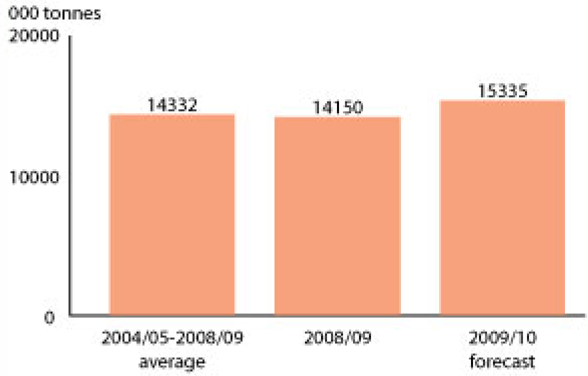
Mexico

Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Maize	21997	24321	23000	-5
Sorghum	6150	6611	6200	-6
Wheat	3265	4020	4100	2
Others	954	960	890	-7
Total	32570	36125	34190	-5

Note: percentage change calculated from unrounded data.

Total cereal imports



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

prices of black beans seem to stabilize but at a very high level compared to quotations of two years ago.

In January, quotations for black beans were at MXN 16 /Kg, approximately 110 percent above prices of January 2008 (MXN 7.6/Kg).

Conversely, despite the local damage to spring/summer grain production, wholesale white maize prices on the Mexico City markets continue to show a steady trend which has lasted almost throughout the last two years.

Rice prices have been declining in the last quarter but are still almost 30 percent higher compared to the level of the same period of two years ago.

GIEWS Country Brief

Mexico

Reference Date: 21-September-2009

FOOD SECURITY SNAPSHOT

- Good rainfall levels after prolonged drought
- 2009 spring harvest of maize, sorghum and rice is underway
- Consistent rising trend for beans price in domestic markets

After prolonged drought, rainfall levels have been good

July saw one of the most intense droughts of the past 40 years in the Central Highlands and North East of Mexico. According to official estimates by field missions, about 840 000 ha have been affected in the states of Jalisco, Puebla, Aguascalientes and Guanajuato, among others. Programmes for resowing, the late sowing of short cycle crops and feedcrops have been put in place, designed particularly for the livestock sector.

In September, partly due to the deviation of the hurricane Jimena to the state of Baja California and the presence of moisture and rainfall from the Gulf of Mexico, there was abundant rainfall in most of the country's agricultural states. Very heavy rain was reported in the coastal states of Tamaulipas and Norte Veracruz, which may have delayed the harvesting of summer grains, specifically sorghum and rice.

2009 summer maize, sorghum and rice harvests are beginning

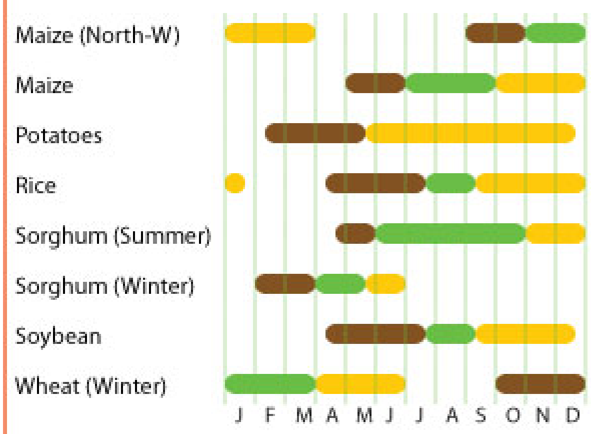
The 2009 spring/summer grain harvests will begin shortly.

Harvest forecasts for this year, despite the drought that has affected the key agricultural departments in the country, are still way above the levels of 2008.

It is expected that the harvest will reach approximately 19 million tonnes of maize (more than 50% above the 12 million tonnes harvested in 2008), 4 million tonnes of sorghum (compared with last season's 3.1 million) and 255 000 tonnes of rice (almost 70 percent above 2008).

Even though these figures are still tentative estimates, output will depend on increased average yields per hectare, brought about, among other things, by investment in irrigation systems throughout the whole country, and especially for maize farming.

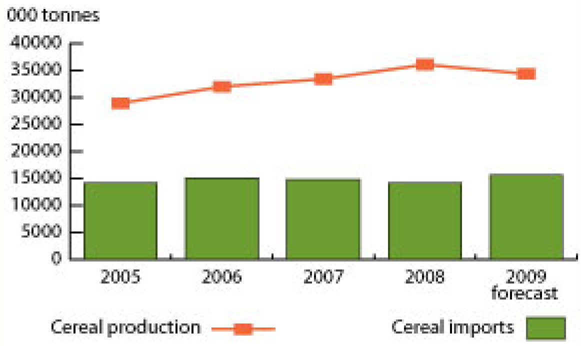
Crop calendar
Mexico



Source: FAO/GIEWS

Cereal production and imports
Mexico

Cereal production	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Maize	21997	24321	23000	-5.4%
Sorghum	6150	6611	6200	-6.2%
Wheat	3265	4020	4100	2%
Other	1197	1173	1110	-5.4%
Total Cereals	32563	36125	34410	-4.7%



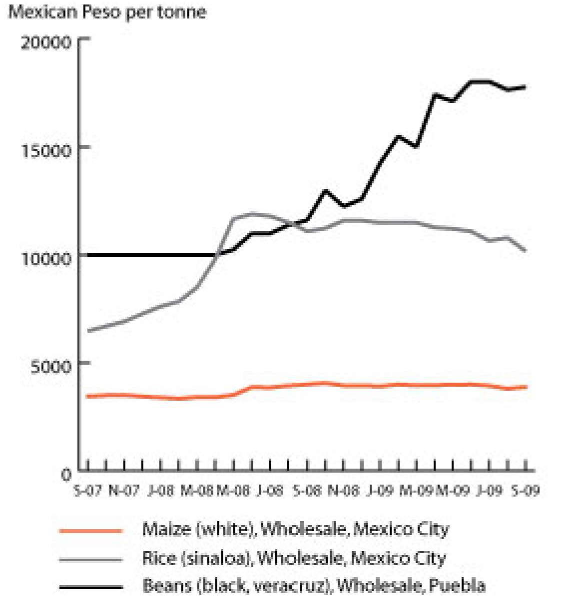
Source: FAO/GIEWS Country Cereal Balance Sheets

Bean prices in Mexico continue to rise

In Mexico City, black bean prices continue to rise. In September, black bean wholesale prices in Veracruz were MXN 16.83 /Kg, approximately 121 percent above September 2007 prices (MXN 7.6/Kg).

Conversely, despite the local damage to spring/summer grain production, wholesale white maize prices on the Mexico City markets fell slightly by approximately 3 percent between June and September 2009. In Puebla, Mexico's fourth largest city, white maize prices continue to remain stable at MXN 3.9/Kg, far below the levels recorded between August 2008 and January 2009 when they reached MXN 4.52/Kg.

Mexico
Selected food prices



Source: Sistema Nacional de Información e Integración de Mercados