United States Department of Agriculture

Foreign Agricultural Service

June 27, 2018

Commodity Intelligence Report

Honduras 2017/18 Crop Updates and Training Workshop

Foreign Agricultural Service (FAS) personnel from the Office of Capacity Building and Development (OCBD), Development Resources and Disaster Assistance Division, in collaboration with the Office of Global Analysis (OGA), International Production Assessment Division traveled to Honduras to better understand cropping systems and to provide a geographic information systems (GIS) technical workshop for the staff at the Agro-Food Information Service (INFOAGRO).

Honduras is one of the three northern countries in Central America which forms the region known as the Northern Triangle. Guatemala and El Salvador are the other two. In Honduras the major crops are corn, sorghum and palm oil. Rice is also produced but to a lesser extent. Crops are typically planted in two seasons, primera (first season) followed by postrera (second season), though a third planting season (known as the Apante season) can occur depending on water availability.

Central America's rainy season is typically May to October. The start of the rainy season is dependent on the northward movement of the Intertropical Convergence Zone. Farmers will plant their first-season crops eyeing when the rainy season will start. For the second season, they want to plant toward the end of the rainy season with the hope that the season extends enough to have good establishment of the crops.

In Honduras, widespread distribution of rainfall for both the 2017/18 primera and postrera seasons benefited planting and crop development, leading to the best harvest achieved in the last several years. The primera planting season begins in May and ends in August, harvest operations begins in September and extends through October. Honduras corn production for 2017/18 is estimated at 520,000 tons, rebounding to normal output levels and up 33 percent from the average of the 2014/15 and 2015/2016 drought years. Harvested area is estimated at 350,000 tons with an estimated yield of 1.49 t/ha, up 63 percent and 22 percent, respectively from the average of the consecutive drought years. Corn is one of the main staple grains in Honduras and is mainly produced in the departments of Olancho (34 percent); El Paraíso (17 percent); Yoro (17 percent) and Santa Bárbara (15 percent). See Figure 1.

Sorghum is only planted in the primera season; due to the length of the growing season harvest begins and is typically completed in February. Sorghum production for 2017/18 is estimated at 40,000 tons with an estimated harvested area of 35,000 hectares. Yield is estimated at 1.14 t/ha. Rice production is estimated at 109,000 tons (rough basis) with an estimated harvested area at 26,000 hectares. Rice yield is estimated at 4.19 t/ha. Palm Oil production for 2017/18 is estimated at 545,000 tons with an estimated harvested area of 150,000 hectares. Palm oil yield is estimated at 3.63 t/ha. Palm oil has seen an increase in production over recent years due to area expansion driven by government-based loans. Last year, however, palm oil area was in flux due to sustainability regulations of the European Union (Honduras' main importer of palm oil), requiring farmers to be certified under the Roundtable on Sustainable Palm Oil (RSPO).

Geographic Information Systems (GIS) Technical Workshop

FAS-OCBD's Development Resources and Disaster Assistance Division (DRDA) has been providing technical assistance to Honduras' INFOAGRO. Headed by the Honduran Foundation for Agricultural Research, INFOAGRO's mission is to collect, analyze and disseminate agricultural data and information. Recently, INFOAGRO's reports have transitioned to incorporating GIS as a way to effectively analyze their data visually. As part of a continued effort to provide technical assistance, FAS-OCBD-DRDA collaborated with FAS-OGA's International Production Assessment Division to spearhead a technical workshop focusing on how to enhance GIS practices into their reports.

The objective of the workshop was to present real-life scenarios through the use of tools and techniques within the ArcGIS platform (GIS software by ESRI) for the purpose of visually displaying data (see Figure 2. for maps developed). The end goal was to train the staff in utilizing the ArcGIS software to efficiently and effectively analyze the data collected by INFOAGRO, and to produce better quality maps and reports for decision making. The training workshop focused on key areas including: discovering existing spatial datasets, downloading satellite imagery (Landsat-8), incorporating geospatial and information tools to assist with market analysis, and generating reports for decision makers.

The collaborative mission accomplished two primary objectives: (1) To support Honduras' INFOAGRO with GIS tools for improved analysis; and (2) To enable FAS personnel to obtain verifying information on Honduran commodity production-related intelligence through meetings with INFOAGRO, Dirección de

Ciencia y Tecnología Agropecuaria (DICTA), Instituto Nacional de Estadísticas (INE) and the Programa Mundial de Alimentos (PMA). Mission travel for all participants was funded by USAID under a USAID-USDA participating agency program agreement (PAPA). The agreement is dedicated to strengthening agricultural market information systems in Central America and the Dominican Republic. The accomplishment of both objectives benefits U.S. agriculture. Improved analysis leads to increased Honduran agricultural development resulting in a middle class inclined to purchase U.S. agricultural exports. The commodity production-related intelligence gathered provides U.S. agricultural producers with information for the identification of potential market opportunities.

The workshop was implemented with additional support from the FAS Attaché in Guatemala, Sean Cox, and Honduras' National Institute of Statistics and the Directorate of Agricultural Science and Technology (DICTA).

Valuable contributions for this report from FAS-OCBD-DRDA are gratefully acknowledged. For additional information on the mission travel please contact Indalecio.Vallejos@fas.usda.gov or Andres.Romero@fas.usda.gov. Future collaborative efforts will be aimed at providing advanced technical support to INFOAGRO. Improving the GIS knowledge, skills, and abilities of agricultural analysts in Honduras will benefit global market analysis.

For additional information contact Justin Jenkins | Justin.Jenkins@fas.usda.gov | 202-720-0419

Current area and production estimates for grains and other agricultural commodities are available on IPAD's Agricultural Production page:
Crop Explorer https://ipad.fas.usda.gov/cropexplorer/or

Production, Supply and Distribution Database (PSD Online):
http://apps.fas.usda.gov/psdonline/psdHome.aspx

U. S. Department of Agriculture
Foreign Agricultural Service
Office of Global Analysis
International Production Assessment Division Ag Box 1051, Room 4630, South Building
Washington, DC 20250-1051
Telephone: (202) 720-1662 Fax: (202) 720-1158

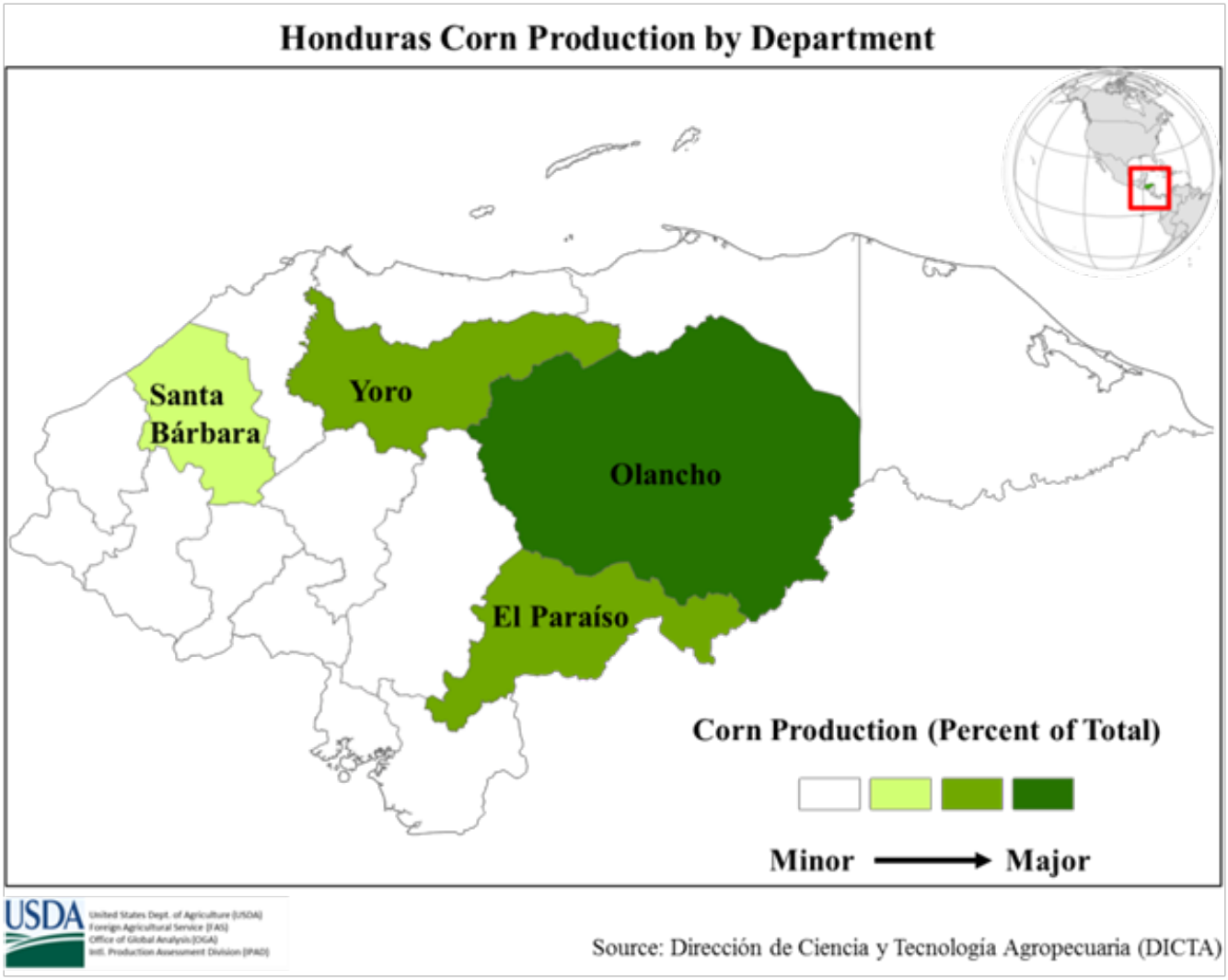

Figure 1: Honduras Corn Production by Department

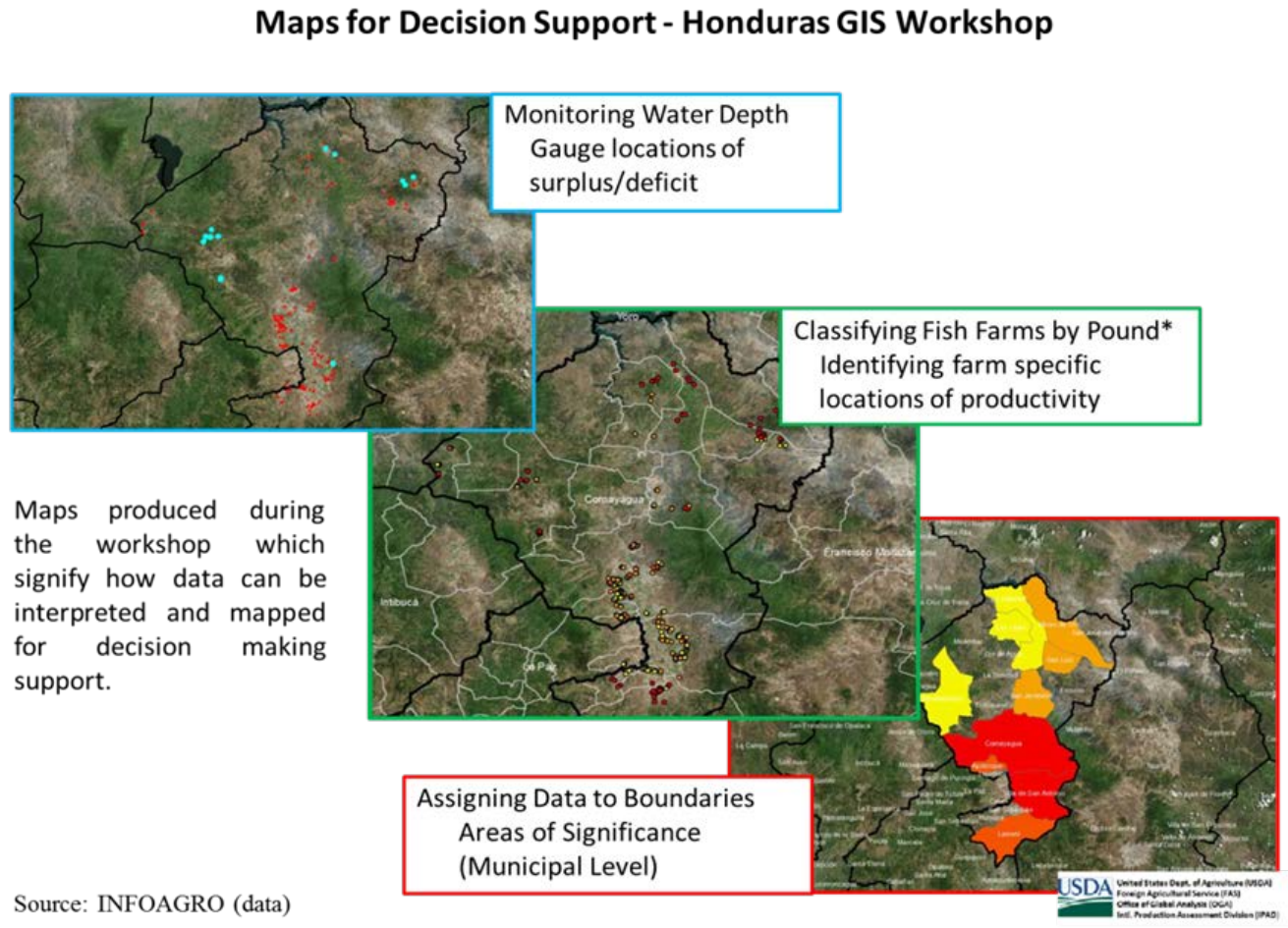

Figure 2: Maps for Decision Support -- Honduras GIS Workshop