



ASEAN Early Warning Information



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Rice Situation in ASEAN

Production

The final production estimate for paddy in the ASEAN region for 2008 (2007/08) crop is 191.11 million tons, up 0.08 million tons from the previous Agricultural Commodity Outlook (ACO) report (December 2008). Indonesia, Lao PDR and Brunei have revised their estimates upward while the Philippines have revised its estimate downward. For other countries the estimates remained unchanged.

The paddy production in the ASEAN region for 2009 (2008/09) is forecast to be 192.45 million tons, up 1.34 million tons or less than one percent from 2008. This forecast has been revised a little upward from 192.35 million tons in ACO report in December 2008. The increases in production in 2009 compared with 2008 were occurred in almost every country in the region except Thailand and Vietnam. The increase in production was due to the increase in both harvested area and yield. The most increase was found in Indonesia, Myanmar, the Philippines and Cambodia. Although Lao PDR and Malaysia have high percentage of increase but the magnitude of the increase very small as compared to major producing countries. Even though the production in Brunei is very small and has very little impact in the region but it is forecasted to reduce almost 30 percent from the previous year production. (Table 1 and Figure 1)

Harvested area

The final estimate for 2008 (2007/08) harvested area of paddy in ASEAN is 46.83 million hectares, up from 45.85 million hectares or about 2 percent from previous year. Most of the increase was in Thailand, the Philippines, Vietnam, Indonesia and Cambodia. For Myanmar, Lao PDR, Malaysia and Brunei the harvested area were decreased from the previous year.

The harvested area in ASEAN is forecast to increase a little from 46.83 million hectares in 2008 to 46.96 million hectares in 2009. However, in Vietnam, Thailand and Brunei the harvested area in 2009 is forecast to decrease from the previous year. The reduction of harvested area in Vietnam and Thailand were mainly due to the respond to price decrease during the second half of 2008. For Brunei, the decrease in harvested area was due to the flood in January and February 2009.

For importing countries such as the Philippines and Malaysia the domestic prices are still high as compared to the previous year and the weather are also very favorable for rice planting, therefore, the harvested area are forecast to increase. In Indonesia, Myanmar, Cambodia and Lao PDR the harvested area are also expected to increase due to the favorable weather. (Table 2 and Figure 2)

Yield

The average paddy yield in ASEAN in 2008 (2007/08) was estimated at 4.08 tons per hectare up from 3.95 tons per hectare or about 3 percent from the previous year. The increases in yield in 2008 were found in every country except in the Philippines, which the yield decreases a little from 3.80 tons per hectare to 3.77 tons per hectare.

The average paddy yield is forecast to increase very little from 4.08 tons per hectare in 2008 to 4.10 tons per hectare in 2009. The increase in yield is expected in every country except Thailand and Brunei. The increases in yield in those countries were mainly due to the use of more improved variety and favorable weather. The decrease in yield in Thailand was because of the cooler weather than normal during December 2008 to January 2009 which affected the growing condition of the second (dry season) crop. In Vietnam, partly drought was occurred in the South and little flooding in the Central part of the country but the area has been replanted successfully. The late rain in the North has made the planting a little bit late as compared to the previous year. The overall impact of the weather condition in Vietnam is not so serious for 2009 crop. (Table 3 and Figure 3)

Damaged Area

The paddy damaged area for ASEAN as a whole in 2009 (2008/09) was estimated at 1.14 million hectares. Flooding was the major cause of damage. The most severe flooding was occurred in Thailand during the wet season crop. For Vietnam, the data on damaged area was not available. (Table 4)

Table 1 : Paddy production in ASEAN countries, 2007-2009

Unit: 1,000 Tons

Country	2007 (2006/07)	2008 (2007/08)	change 2008 over 2007		2009 (2008/09)	change 2009 over 2008	
			Quantities	(%)		Quantities	(%)
ASEAN	181,134.44	191,110.17	9,975.72	5.51	192,453.09	1,342.92	0.70
Brunei	1.51	1.40	-0.11	-7.15	0.99	-0.41	-29.28
Cambodia	6,264.12	6,727.12	463.00	7.39	7,173.84	446.72	6.64
Indonesia	57,157.44	60,251.07	3,093.63	5.41	60,931.91	680.84	1.13
Lao PDR	2,663.70	2,847.38	183.68	6.90	2,944.74	97.37	3.42
Malaysia	2,375.60	2,374.18	-1.42	-0.06	2,448.01	73.82	3.11
Myanmar	30,923.00	31,442.47	519.47	1.68	32,088.42	645.95	2.05
Philippines	16,240.19	16,815.55	575.36	3.54	17,321.83	506.28	3.01
Singapore	-	-	-	-	-	-	-
Thailand	29,641.87	32,099.40	2,457.53	8.29	31,383.36	-716.04	-2.23
Vietnam	35,867.01	38,551.60	2,684.59	7.48	38,160.00	-391.60	-1.02

Table 3 : Paddy harvested area in ASEAN countries, 2007-2009

Unit: 1,000 Hectares

Country	2007 (2006/07)	2008 (2007/08)	change 2008 over 2007		2009 (2008/09)	change 2009 over 2008	
			Quantities	(%)		Quantities	(%)
ASEAN	45,847.57	46,833.55	985.98	2.15	46,955.30	121.75	0.26
Brunei	1.35	1.15	-0.20	-14.96	0.90	-0.25	-21.87
Cambodia	2,516.41	2,566.95	50.54	2.01	2,612.47	45.52	1.77
Indonesia	12,147.64	12,309.16	161.52	1.33	12,422.16	113.00	0.92
Lao PDR	796.48	774.06	-22.41	-2.81	781.10	7.04	0.91
Malaysia	673.24	667.66	-5.59	-0.83	669.85	2.20	0.33
Myanmar	8,074.00	8,011.39	-62.61	-0.78	8,101.80	90.41	1.13
Philippines	4,272.89	4,459.98	187.09	4.38	4,526.19	66.21	1.48
Singapore	-	-	-	-	-	-	-
Thailand	10,165.16	10,668.91	503.75	4.96	10,640.83	-28.08	-0.26
Vietnam	7,200.41	7,374.30	173.89	2.41	7,200.00	-174.30	-2.36

Table 3 : Paddy yield in ASEAN countries, 2007-2009

Unit: Tons/Hectare

Country	2007 (2006/07)	2008 (2007/08)	change 2008 over 2007		2009 (2008/09)	change 2009 over 2008	
			Quantities	(%)		Quantities	(%)
ASEAN	3.95	4.08	0.13	3.29	4.10	0.02	0.44
Brunei	1.12	1.22	0.10	9.18	1.11	-0.12	-9.48
Cambodia	2.49	2.62	0.13	5.28	2.75	0.13	4.78
Indonesia	4.71	4.89	0.19	4.03	4.91	0.01	0.21
Lao PDR	3.34	3.68	0.33	9.99	3.77	0.09	2.49
Malaysia	3.51	3.56	0.05	1.31	3.65	0.10	2.77
Myanmar	3.83	3.92	0.09	2.47	3.96	0.04	0.92
Philippines	3.80	3.77	-0.03	-0.80	3.83	0.06	1.50
Singapore	-	-	-	-	-	-	-
Thailand	2.92	3.01	0.09	3.18	2.95	-0.06	-1.97
Vietnam	4.98	5.23	0.25	4.95	5.30	0.07	1.38

Table 4 : Paddy damaged area in ASEAN by cause of damage, 2009

Country	Cause of Damage (Hectare)					
	Flood	Drought	Pests	Diseases	Others	Total
ASEAN	261,081	205,607	1,526	1,054	16,480	1,139,546
Brunei	486.35	-	12	-	-	498
Cambodia	1,010	1,845	418	-	-	3,273
Indonesia	na	na	na	na	na	653,798
Lao PDR.	29,821	3,091	367	193	8,163	41,635
Malaysia	430	287	729	861	143	2,450
Myanmar	7695	-	-	-	8,174	15,869
Philippines	1,808	-	-	-	-	1,808
Singapore	-	-	-	-	-	-
Thailand	219,831	200,384	-	-	-	420,215
Vietnam	na	na	na	na	na	na

Figure 1: Paddy production of selected countries in ASEAN, 2008-2009

Million Ton

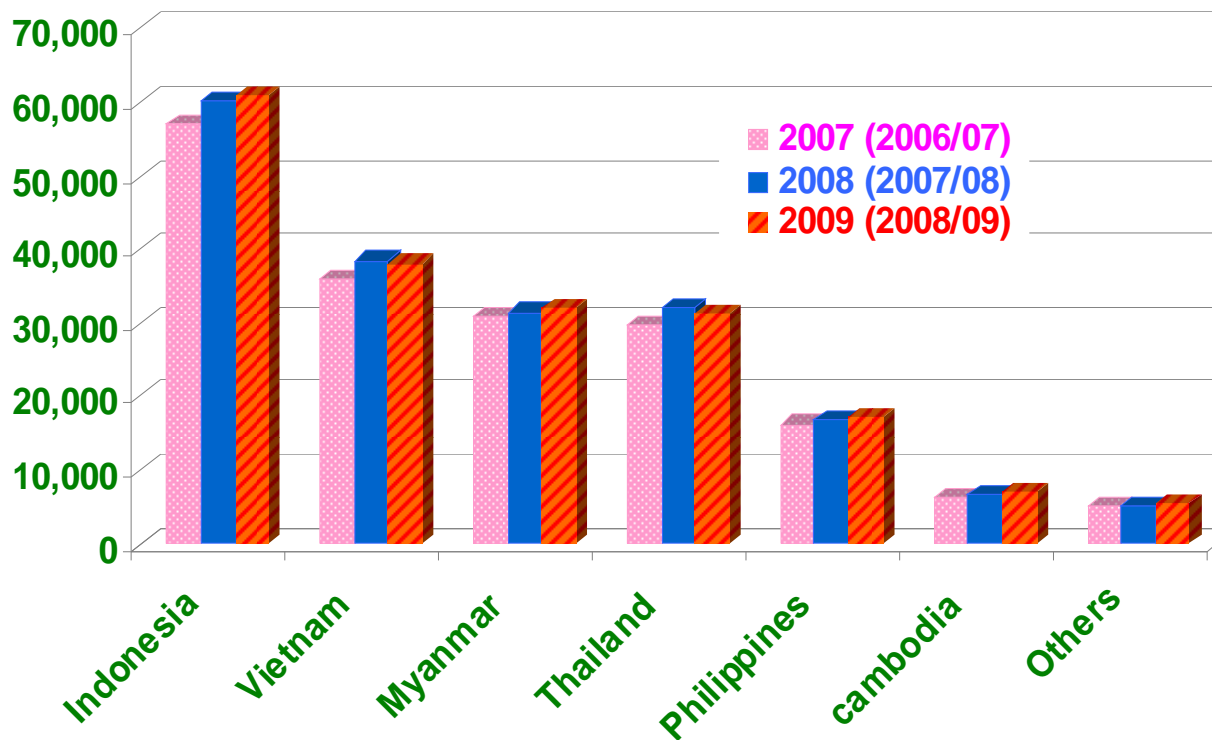


Figure 2: Paddy harvested area of selected countries in ASEAN, 2008-2009

Million Ha

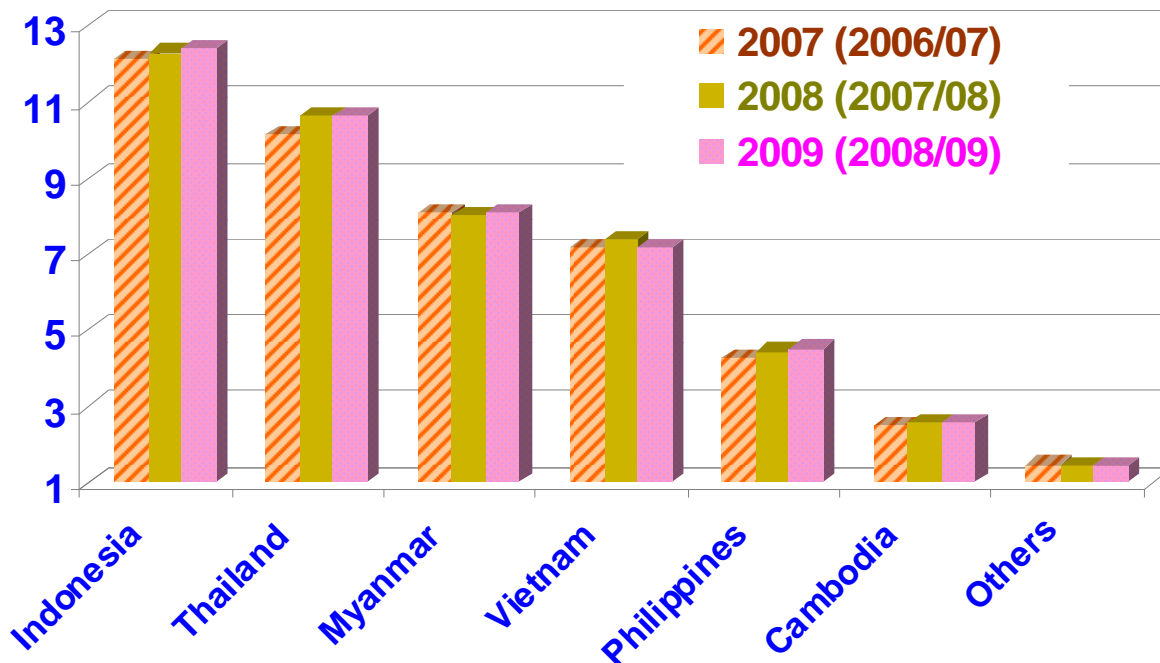


Figure 3: Paddy yield of countries in ASEAN, 2008-2009

Ton / ha

