




EWI No.27
September 2021



ASEAN EARLY WARNING INFORMATION

Crop Situation.

Released by AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
<http://www.aptfsis.org/>

Crop Situation in Brunei Darussalam 2021



The overall weather in Brunei Darussalam in 2021 is favorable for cultivating crops. With sufficient rainfall (the amount of rain ranges from 20 to 50 millimeters per day), sufficient sunlight for the plants with average temperature of 27 degrees Celsius, good water management and irrigation system in the country, has allow farmers to grow crops for the whole year. However, with spread of **COVID-19** globally it has also affected agriculture production in Brunei Darussalam, whereby temporary suspension on travelling to and from Brunei for certain countries has contributed to labor shortages in agricultural sector as farmers are having difficulties to bring in workers from other countries. This caused some farmers to reduce the production of sugarcane and change to grow maize and cassava because these two crops are very popular, high production value, high demand in the country, and require less labors compared to other crops. The situation of five main crops can be described as follows:

Rice production is predicted to increase due to increase in planted areas and yield. Rice planted area is expected to increase as the weather is suitable for crop cultivation and there is good water management and irrigation system especially in the Brunei Muara district. Some areas were affected by Brown Planthopper (*Nilaparvata lugens*) which was one of the major rice pests in the country, causing severe hopperburns for rice plants, these affected rice plants planted in Oct 2020 – Feb 2021 season were not able to be harvested. However, no significant damage was observed during the planting season (April – August 2021) as the Brown Planthopper population was very low, thus below threshold level. Likewise, rice yield is expected to increase due to farmers have improved rice management, use hybrid rice varieties such as “Sembada 188” to increase productivity in irrigated areas, conducive weather and better management of farms. The harvesting period of rice in 2021 is around from February 2021 to April 2021 in wet season, and from July to September 2021 in the dry season.

For **maize**, the planted area is forecasted to increase from previous year because the weather is suitable for planting crops and farmers respond to price increase which encourages farmers to expand planted areas. Farmers also take good care of crops, use good variety, and use more fertilize resulting to the increase in yield.

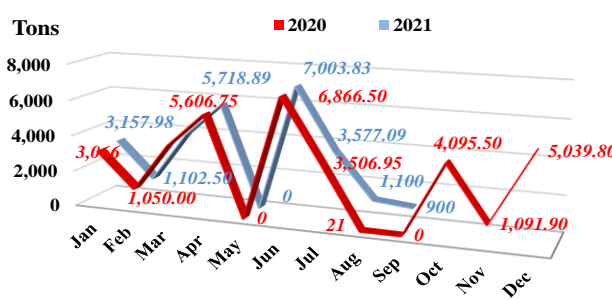


Figure 1: Monthly quantity of rice import in 2020 - 2021

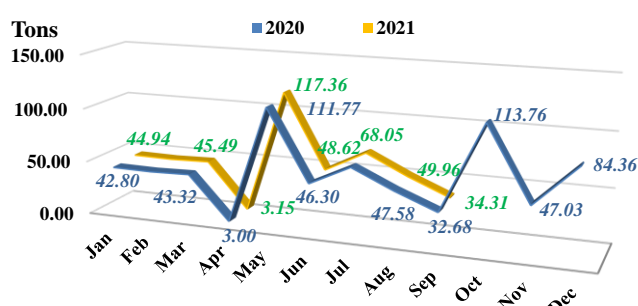


Figure 2: Monthly quantity of soybean import in 2020 – 2021

For **sugarcane**, the planted area as well as production declined because some companies change to different crop plantation and farmers do crop rotation to improve soil health, optimize nutrients in the soil, and combat pests and diseases.

For **cassava**, the planted area and production are forecasted to increase from previous year because the weather is suitable for planting crops and cassava is very popular and high demand in the country, since cassava is used for other food processing. Furthermore, farmers prefer to plant this crop because it is very convenient and use less workers compared to other crops, and farmers can obtain high net returns from higher yield. In addition, farmers also take good care of crops, uses good variety, and uses more fertilizer resulting in the increase in yield.

Crop Situation in Cambodia 2021



For **cassava**, the planted area and production are expected to increase from previous year as the price of cassava goes up. Additionally, the government supports to grow cassava by using good variety and favorable weather. Even though natural disasters occurred from flood, pests, and diseases, it does not affect the total production in the country. The harvesting period is from November 2021 to January 2022.

The planted area of **soybean** is predicted to decline from last year due to falling soybean price and unfavorable weather for cultivating crops. Likewise, soybean production is expected to decline due to the impact of the thunderstorm which caused flood. The harvesting period of soybean in 2021 is during September to October 2021.

The overall weather in Cambodia in 2021 (2020/2021) has small to medium rainfall with rain amount ranges from 20 to 50 millimeters per day. There is a sufficient amount of sunlight and an irrigation system to contain water during dry season. The average temperature is at 25 to 38 degrees Celsius. **Cambodia's natural disasters** are flood, drought, diseases, and pests in some areas. Although most of the agricultural areas are irrigated, some of the planted areas are still facing drought as there is no thorough or lack of irrigation system. Those areas with drought are Banteay Mean Chey, Battambang, Pursat, Kampong Thom, Siem Reap, Kampong Cham, Takeo, Kampong Speu, and Prey Veng. With regard to the spread of COVID-19, it continues to affect Cambodia as follows 1) the cost of production gets higher since the demands for agricultural goods have increased causing the factor of production's price to be raising, 2) the shortage of agricultural labors causes agricultural activities to be slower, 3) the logistics cost increases and the receivers get the goods delayed than scheduled, 4) the agricultural goods raise their prices due to the increase of demand within the country, and 5) domestic and local trading are slow. For rice export in July 2021, Cambodia exported 29,415 tons of milled rice worth USD 21.18 million, an increase of 3.53% compared to the volume exported in July 2020 or increase of 11.10% compared to export volume in July 2019. Although there are issues of container shortage and the high cost of sea freight to EU markets, the market's conditions have resumed to be back as normal and Cambodia's rice exports to resume positively, especially for exporters who missed or delayed delivery from the first semester. However, for 6 months, Cambodia rice exported in 2021 was decreased 27% compared to the volume exported in 2020. The major challenges of these decreasing were lacking of containers and increasing of freight cost, it affected the orders of premium fragrant rice mainly to EU markets and the dropped selling price (FOB) from averagely \$900 per metric ton in year 2020 to \$730 per metric ton. For maize export, in 8 months, Cambodia exported in 2021 was decreased 21% compared to the volume exported in 2020. It could be affected the orders in ASEAN and other countries requirement. For soybean export in 2021, for 8 months, Cambodia exported around 20,000 tons which was increased 100% compared to the volume exported in 2020. This total export of soybean in 2021 was exported to Vietnam 60% and Thailand 40%. For cassava export, in 8 months, Cambodia exported in 2021 was increased 6% compared to the volume exported in 2020. Specifically, the cassava slices which was exported to Thailand, Vietnam, and China was increased by 12.37% compared to 2020. The situation of five main crops can be described as follow.

The planted area and yield of **rice** in this year are expected to rise from last year due to favorable weather together with government policy. Farmers also use good varieties and take good care of their crops from planting period to harvesting period. Although some areas in the country were affected by drought and flood which caused damage up to 9,225 hectares, it is not affected the total production of the country. The harvesting period of rice in 2021 is from August to December 2021 for wet season, and from February to April 2021 for dry season.

For **maize**, the planted area is forecasted to decline from previous year due to the decreasing prices of maize together with unfavorable weather. Besides, the maize production is also expected to decrease as it is affected from flood and drought in some areas. The harvesting period of maize is July to September 2021 for wet season, and February to March 2021 for dry season.

For **sugarcane**, the production is estimated to increase from last year due to the rising sugarcane price and favorable weather for cultivating crops. In the meantime, sugarcane production is expected to slightly increase because farmers take good care of their crops. The harvesting period of sugarcane in 2021 is from November 2021 to December 2021 or January 2022.

Crop Situation in Indonesia 2021



Rice planted area is expected to increase as the weather is suitable for crop cultivation and there is good water management and irrigation system. Government policy also encourages farmers to expand their cultivation areas in order to meet the domestic consumption. Additionally, the weather is favorable and farmers take good care of crops resulting in the increase in yield. Although natural disasters occurred from floods, droughts, diseases, and pests affect some areas which damage planted areas around 58,059.02 hectares, total production of the country is not affected. The harvesting periods in 2021 are from January 2021 to June 2021 for wet season and from July to December 2021 in dry season.

The planted area of **soybean** is forecasted to increase due to suitable weather for planting crops and specific needs of local soybean. The yield of soybean is expected to decrease due to diseases and pests. The damage area from flood is approximately 21.5 hectares. The harvesting periods are divided into 3 phrases which are January to April 2021 for the first crop, May to August 2021 for the second crop, and September to December 2021 for the last crop.

The weather in Indonesia in 2021 (2020/21) is favorable for growing crops as there are suitable sunlight, proper temperature, and adequate rainfall for crops due to good water management and irrigation system for planting crops. The amount of rain ranges from 50 to 100 millimeters per day. Four kinds of natural disasters which were floods, droughts, diseases, and pests that caused damage in important planting areas: 1) floods in planted area of rice (Aceh, North Sumatera, Jambi, Lampung, West Java, Central Java, East Java, Banten, South Kalimantan, and South Sulawesi), planted area of maize (North Sumatera, West Sumatera, Central Java, West Nusa, East Nusa, West Kalimantan, and South Kalimantan), and planted area of soybean (Riau), 2) droughts in planted area of rice (Aceh, North Sumatera, Central Java, and South Sulawesi), and planted area of maize (DI Yogyakarta, West Nusa, and Papua), 3) diseases in planted area of rice (West Sumatera, Lampung, West Java, Central Java, East Java, Bali, South Sulawesi, South-East Sulawesi, and Papua), and planted area of maize (DI Yogyakarta, West Nusa, and Papua), and 4) pests in planted area of rice (West Sumatera, Lampung, West Java, Central Java, East Java, Bali, South Sulawesi, South-East Sulawesi, and Papua), and planted area of maize (DI Yogyakarta, West Nusa, and Papua). Due to the spread of **COVID-19**, it does not affect the production in the country. The situation of five main crops can be described as follow.

For **maize**, the planted area is forecasted to increase from the previous year because the weather is suitable for planting crops and the government has a policy to support cultivation of maize which encourages farmers to expand planted areas. Farmers also take good care of crops and select to use good variety resulting in the increase in yield. Natural disasters from floods, droughts, diseases, and pests damaged planted areas approximately 2,378.94 hectares, but it does not affect the whole production. The harvesting period of maize in 2021 can be divided into 3 periods which are during January to April 2021 for the first crop, May to August 2021 for the second crop, and September to December 2021 for the third crop.

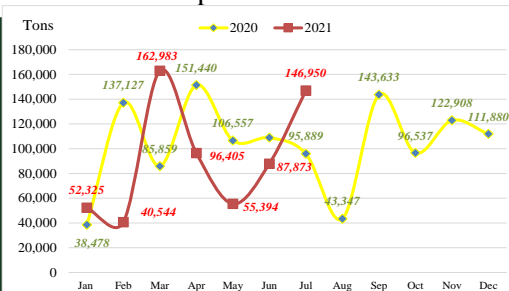


Figure 1: Monthly quantity of maize import in 2020 - 2021

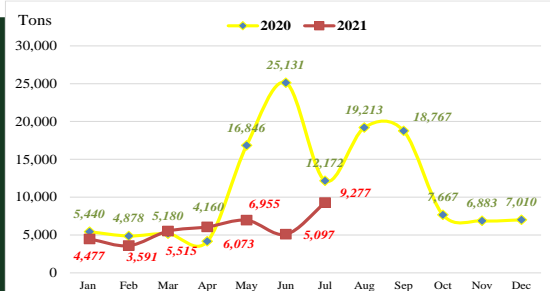


Figure 2: Monthly quantity of maize export in 2020 - 2021

The planted area of **cassava** is forecasted to decrease due to the falling prices of cassava. Consequently, farmers change to grow other crops which give higher prices such as rice, maize, and vegetables. While cassava yield still increases due to favorable weather and using good variety. The harvesting period of cassava can be divided into 3 phrases which are January to April 2021 for the first crop, May to August 2021 for second phrase, and September to December 2021 for the last crop.

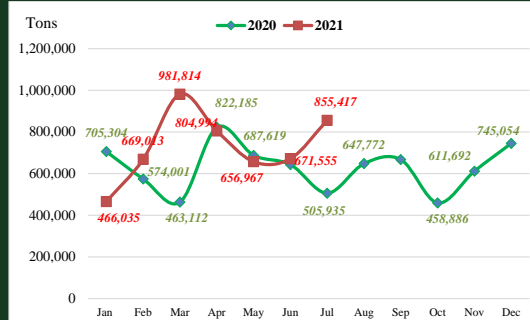


Figure 3: Monthly quantity of soybean import in 2020 - 2021

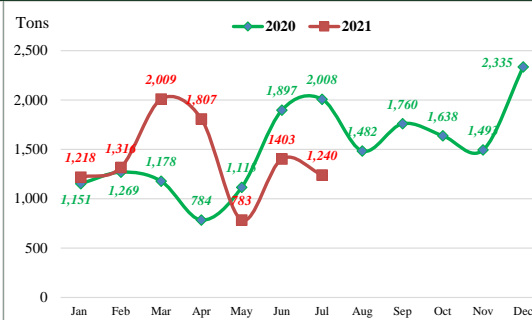


Figure 4: Monthly quantity of soybean export in 2020 - 2021

For **sugarcane**, as the price of sugarcane goes up, it increases incentive of farmers to expand their planted areas. Moreover, the weather is favorable for planting sugarcane resulting in the increase in yield. The increase in farmer productivity this year is one of the factors in increasing sugar production. The harvesting period is from November 2020 to July 2021.



Crop Situation in Lao PDR 2021



For **soybean**, the planted area and yield are estimated to decrease because farmers respond to the drop of soybean price and the market of soybean limitation to sell products. The harvesting period of soybean in 2021 is from May to October 2021 for wet season and November 2020 to February 2021 for dry season.

The production of **cassava** is forecasted to increase due to the increase in planted area and yield. The planted area is expected to increase as the price of cassava goes up. Yield is expected to increase because of favorable weather, sufficient sunlight for plants, and good care taken from the farmers to their crops. The harvesting period of cassava in 2021 is from May to November 2021.

The weather situation of Lao PDR in 2021 (2020/2021) is recorded with heavy rainfall of around 50 to 100 millimeters per day. Generally, the weather is favorable for cultivating crop as usual as it has suitable temperature and sufficient rainfall. In the North, some areas were affected by flood due to heavy rain. In addition, the water resources for growing crop were too cold during winter causing some effects in various crops, especially on paddy areas which required lots of water. Due to the spread of COVID-19, the country's border is temporally close, affecting the price and the import-export of agricultural goods. The price of some agricultural goods such as rice, maize, and cassava have risen as most of the population tends to consume more on domestic products. Thus, the agricultural labors are required more to increase the production in order to sufficient the domestic uses as well as maintain food security. For the COVID-19's effect on the agricultural import-export, it has been recorded with the decrease of rice and maize imports. However, the imports of soybean and sugarcane rise as there is not enough production compared to domestic consumption. In terms of the export situation, rice, maize, and soybean exports decrease. Nevertheless, the exports of sugarcane and cassava become greater due to the increase of demand from the top cassava exporting country. The production situations of five main crops are as follows.

For **rice**, the planted areas are expected to decrease per effect of flood from the heavy rainfall in the North. The production is expected to increase as farmers take good care of crops and get support from the governmental project namely Government Policy for Food Security and Nutrition Program. This project focuses on increasing the yield of rice production. The harvesting period of rice in 2021 is around from September to December 2021 in the wet season, and from February to May 2021 in the dry season.

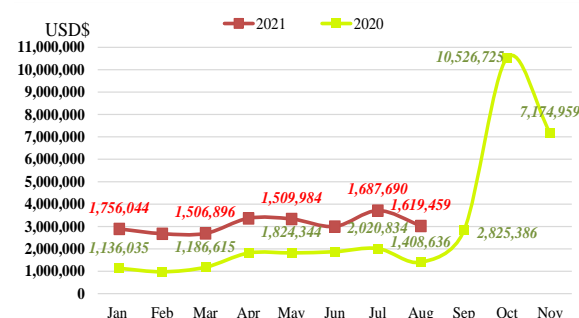


Figure 1: Monthly value of rice import in 2020 - 2021

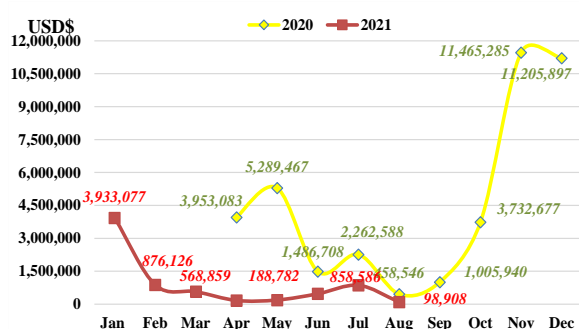


Figure 2: Monthly value of rice export in 2020 - 2021

For **maize**, the planted area and the yield are estimated to increase due to the favorable weather. The sufficient sunlight and water, together with the rise of the maize price causing the farmers to take good care on crop. The harvesting period of maize in 2021 is around from May 2021 to September 2021 in the wet season, and from November 2020 to March 2021 in the dry season.

For **sugarcane**, planted area and yield are predicted to increase due to the favorable weather. The maize gets sufficient sunlight, enough water, and governmental support under the project which focuses on producing crops that have the potential to be commercialized for export. The harvesting period of sugarcane in 2021 is around from February 2021 to May 2021.

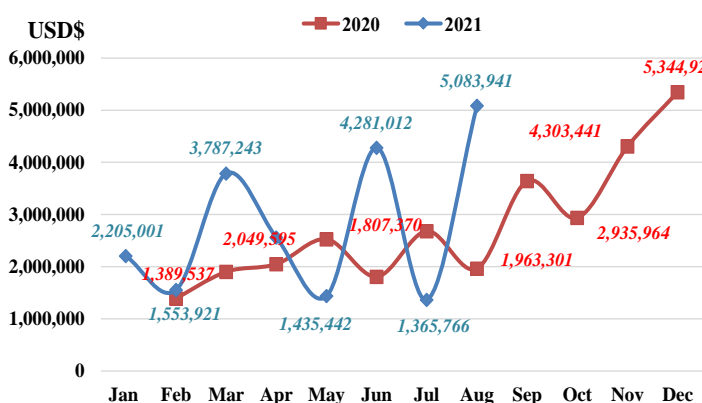


Figure 3: Monthly value of sugar import in 2020 - 2021

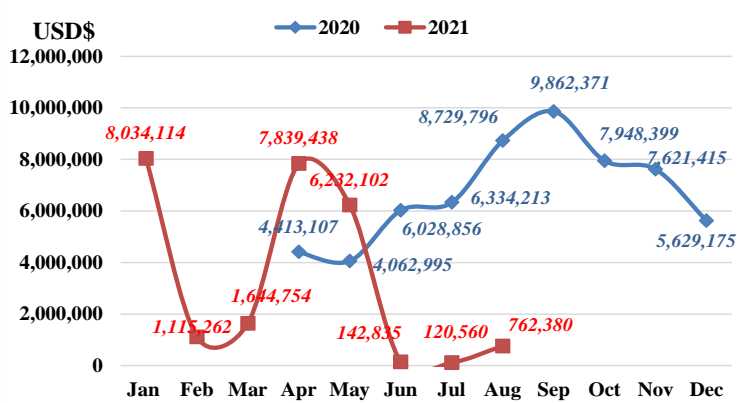


Figure 4: Monthly value of sugar export in 2020 - 2021



Crop Situation in Malaysia 2021

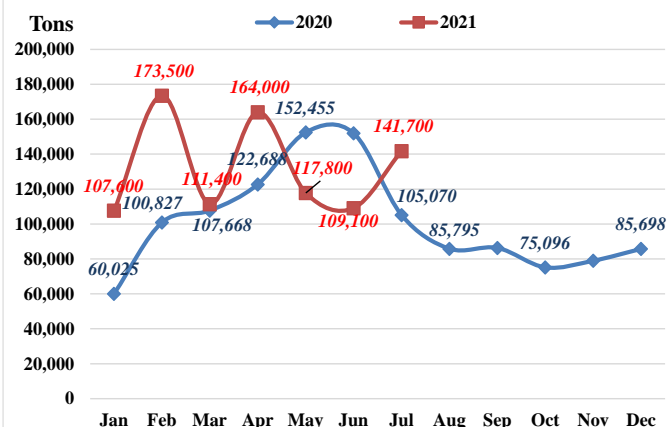


Figure 1: Monthly quantity of rice import in 2020 - 2021

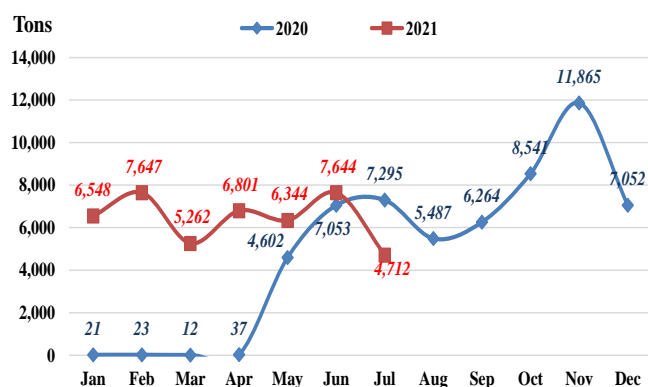


Figure 2: Monthly quantity of rice export in 2020 - 2021

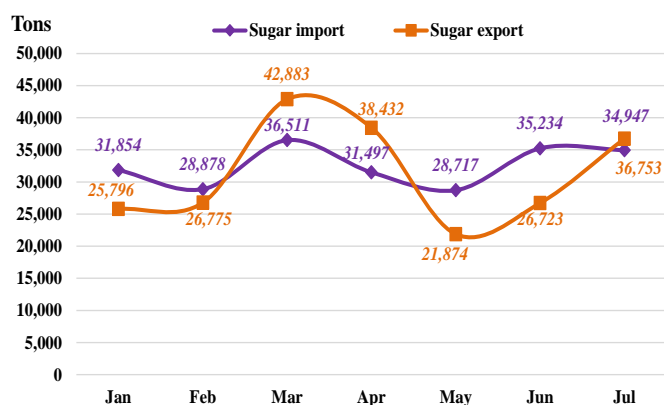


Figure 3: Monthly quantity of sugar in 2021

The weather is Malaysia in 2021 (2020/2021) is aberrant in general as hot weather takes turn to occur with scattered rain in some areas. The lowest temperature is at 20.8 degrees Celsius with the average temperature at 29.1 degrees Celsius. The rainfall amount ranges from around 20 to 50 millimeters per day. Although there is an irrigation system for the cultivation area, it is not thorough. Consequently, some planted areas do not get enough water. Natural disasters that occurred in the country mostly are diseases and pests in Selangor and Perak, respectively. In terms of **imports of rice and sugarcane** are expected to increase *to ensure that the population will have sufficient food* as well as maintain food security per domestic consumption during the spread of COVID-19. For **cassava and maize imports**, they are also forecasted to increase to sufficient food processing factories and feed processing factories with ingredients during COVID-19 for economic viability and also to meet the demand especially of countries affected by COVID-19 pandemic. In terms of **exports of rice, maize, cassava, and sugarcane** are expected to rise as the exports are necessary to survive economically and to respond to the demands from the COVID-19 affected countries.

For **rice**, the planted area is expected to decrease due to unfavorable weather and converting agricultural land to commercial land. The production is expected to decrease due to diseases, pests, reduction in planted area caused by converting agricultural land to commercial land. This can be confirmed through the IADA Seberang Perak Report which shows the attack of Bena Brown disease, White Bena disease, Stem Worm, Fold Worm, and Sail worm. The total damage planted areas of rice in 2021 is approximately 10,186 hectares. Furthermore, paddy production in the state of Perak experienced a significant decline in yields due to the low quality of rice. The harvesting period of rice in 2021 is around from November 2021 to May 2022 in wet season, and from June to November 2021 in the dry season.

The production of **cassava** is forecasted to increase due to the increase in planted area and yield. The planted area is expected to increase as the price of cassava goes up and price of competing crops decrease. Yield is expected to increase because of favorable weather, sufficient sunlight for plants, and good care taken from the farmers to their crops. Also, there is no COVID-19 effect on cassava products as cassava can be harvested for a whole year and not a seasonal crop.



Crop Situation in Myanmar 2021



The weather in Myanmar in 2021 (2020/2021) is generally aberrant. Some of the areas have medium to heavy rainfall with an average amount of 20-50 millimeters per day. However, some areas are facing drought causing the temperature to be hotter than usual. It is suspected to be the consequence of the decreasing of natural resources resulted from deforestation within the country. There was a natural disaster due to heavy rainfall occurred and caused the flood in some areas such as Naypyidaw, Kachin, Kayar, Kayin, Sagaing, Bago, Magway, Mandalay, Mon, Rakhine, Yangon, Shan, and Ayeyarwaddy. While, some areas which were Naypyitaw, Kayar, Sagaing, Bago, Magway, Mandalay, and Shan were facing drought. Also, human-animal diseases impacted some areas in Kachin, Chin, Sagaing, Tanintharyi, Bago, Magway, Mandalay, Yakhine, Yangon, and Ayeyarwaddy. Moreover, the pest-affected areas were Kachin, Chin, Sagaing, and Yakhine. Additionally, for the landslide was occurred in Magway area. With regard to the spread of **COVID-19**, it does not have much impact on the production, price, **export, and import** of rice, maize, sugarcane, soybean, and cassava as these five crops are still the main commodities for ensuring food security in the country. Therefore, the promotion toward the agricultural production, export, and import is still essential in order to adequately supply the domestic consumption as well as export the goods for country's income. The export situations of maize and cassava are expected to increase due to the increasing crop production. For the export of sugar, it is also expected to increase due to the increase of market extending. For the exports of rice and soybean, they are expected to decrease due to the lack of production in the country. In the meantime, the import of maize and cassava are expected to decrease as these crop productions are already sufficient for the domestic consumption. Nevertheless, only soybean is needed to be imported as the production is not adequate for domestic uses. The production situation of five main crops are as follows.

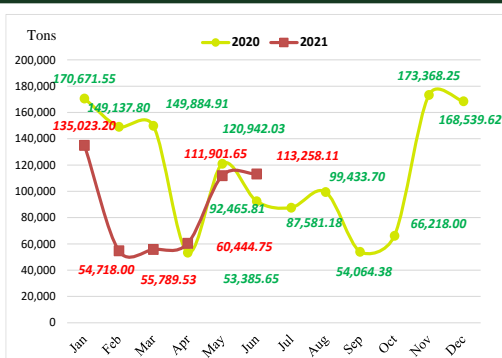


Figure 1: Monthly quantity of rice export in 2020 - 2021

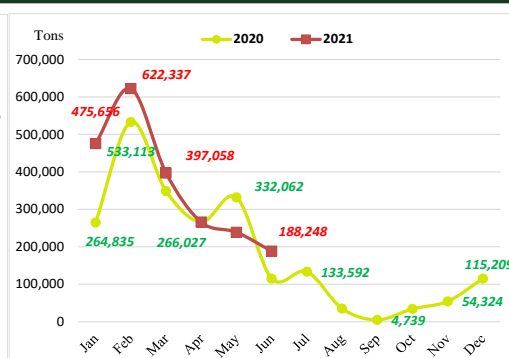


Figure 2: Monthly quantity of maize export in 2020 - 2021

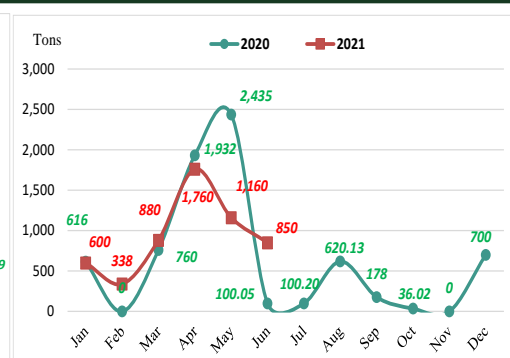
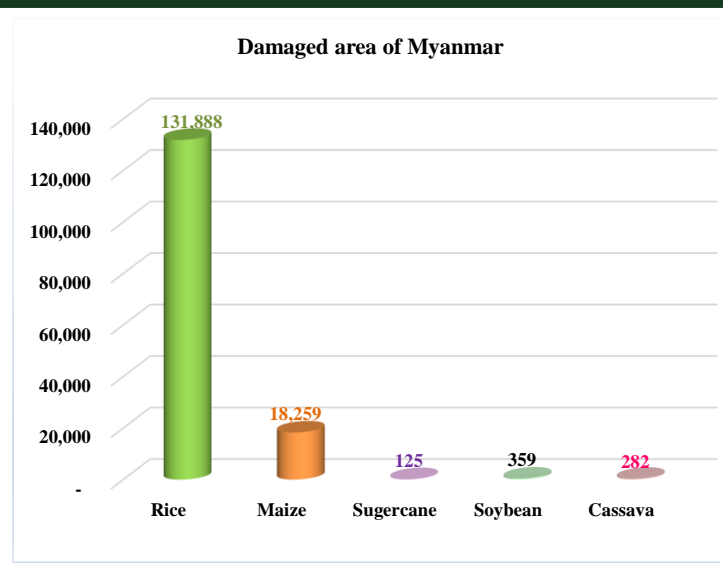


Figure 3: Monthly quantity of maize import in 2020 - 2021

For **rice**, **sugarcane**, and **soybean**, the planted area and the production declined due to the unfavorable weather. The heavy rainfall caused flood in many areas, consequently, their planted areas were damaged for around 131,888 hectares, 125 hectares, and 359 hectares, respectively. The harvesting period of rice in 2021 is around from August 2020 to February 2021 in the wet season, and from February to August 2021 in the dry season. The harvesting period of sugarcane is from October 2020 to May 2021. The harvesting period of soybean in 2021 is around from August 2020 to January 2021 in wet season, and from December 2020 to May 2021 in the dry season.

For **maize**, the planted area and the production rise as the maize price has risen, consequently, the farmers take good care of the crop and increase the planted areas which led to the increase of the production. Nevertheless, the aberrant weather caused by the decrease of natural resources in the country affects the weather to be hotter than usual and occupied alternately with rain and blustery wind. Thus, the damage of the planted areas are around 18,259 hectares. The harvesting period of maize in 2021 is around from August 2020 to December 2020 in wet season, and from January to June 2021 in the dry season.

For **cassava**, the planted area and the production rise due to the favorable weather, good care of the crop taken by the farmers, and the effective harvesting. The damaged areas are around 282 hectares which were caused by the aberrant weather and the insurgent area of the planted area. The harvesting period of cassava is between September 2020 and June 2021.



Crop Situation in the Philippines 2021



For **maize**, as it is impacted by Typhoon Fabian, Typhoon Bising, and Southwest Monsoon, the harvested area is estimated to decrease. However, the production of maize is expected to increase because of government supports to corn farmers. The harvesting period of Maize in 2021 is from July to December 2020 for wet season, and January to June 2021 for dry season.

For **soybean**, the harvest area is expected to decrease because farmers shifted to yellow corn production due to no buyer coupled with the unavailability of planting materials in some areas. The reduction in harvest area resulted in the declining production of soybean. The harvesting period of soybean in 2021 was from July to December 2020 for wet season, and January to June 2021 for dry season.

For **sugarcane**, the production is expected to increase because the government support small farmers and more cane laborers. The harvesting period of sugarcane in 2021 is from September 2020 to August 2021.

For **cassava**, the harvest area and yield are estimated to decrease as demand on cassava for industrial use shrinks particularly from processors. Hence, farmers change to grow other crops such as yellow corn due to subsidy of seeds and fertilizer from the Department of Agriculture. Some areas have been changed from planting cassava for industrial use in order to support yellow corn processing instead. The harvesting period of Cassava in 2021 was from July to December 2020 for wet season, and January to June 2021 for dry season.

The crop conditions of Philippines in 2021 (2020/21) have natural disasters in the country which were Typhoon Fabian, Typhoon Bising, and Southwest Monsoon. These typhoons and monsoon caused damages in many regions which were Region 5 (Bicol Region) Catanduanes, Region 1 (Ilocos Region), Region 3 (Central Luzon), Region 8 (Eastern Visayas), Cordillera Administrative Region, and National Capital Region. They also directly impacted the cultivation of rice, maize, and cassava. The effect of damage from **natural disasters** is caused by strong wind and heavy rainfall which is more than 151 millimeters per day or more resulting in flood. Consequently, pests such as rats and worms from flood caused damages in the planted area. However, the number of total damaged area of crop have not been reported yet. The situation of **import-export** of rice, maize, cassava, and soybean cannot be assessed due to the incomplete actual data from August to December 2021. For the import of sugar, it was declined due to lower demand of sugar-based products by foreign markets. While the sugar export was increased due to the additional load in August 2021 which is loaded as part of other commodities unlike from February to June shipments which are regular boatloads exclusively for sugar exports to the US. In addition, the effect of **COVID-19** to crops productions cannot be assessed due to the non-availability of data related to the pandemic. The situation of 5 main crops are as follows.

For **rice**, the harvested area is expected to decrease due to the impact of Typhoon Fabian, Typhoon Bising and Southwest Monsoon. However, most of the rice farmers received help and support from the government. Therefore, the production is forecasted to increase from the previous year. The harvesting period of rice in 2021 is from July to December 2020 for wet season, and January to June 2021 for dry season.

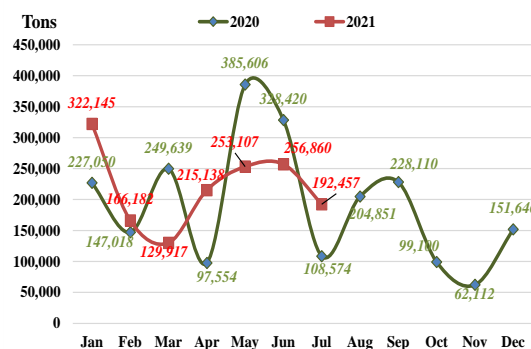


Figure 1: Monthly quantity of rice import in 2020 - 2021

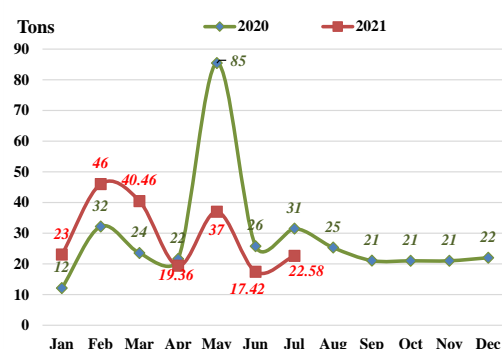


Figure 2: Monthly quantity of rice export in 2020 - 2021

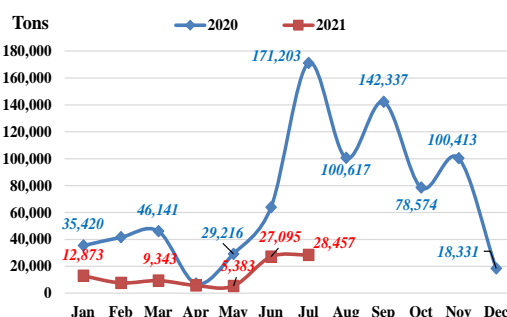


Figure 3: Monthly quantity of maize import in 2020 - 2021

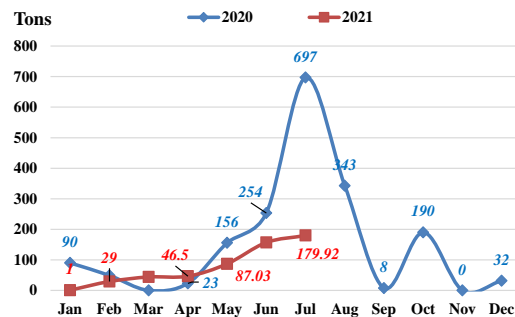


Figure 4: Monthly quantity of maize export in 2020 - 2021

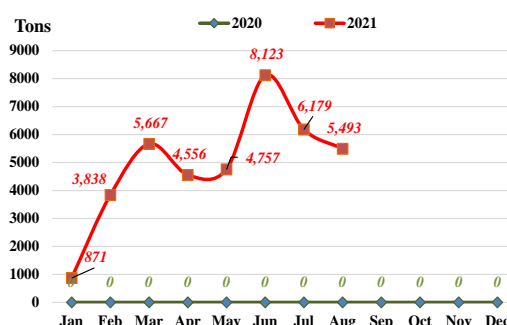


Figure 5: Monthly quantity of sugar import in 2020 - 2021

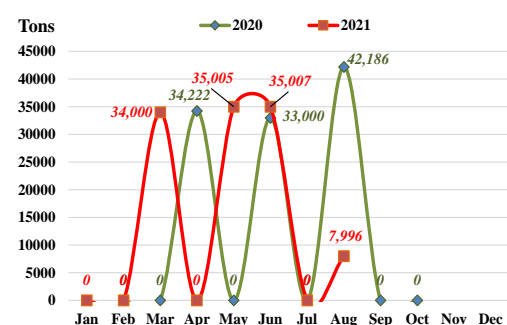


Figure 6: Monthly quantity of sugar export in 2020 - 2021

Crop Situation in Thailand 2021

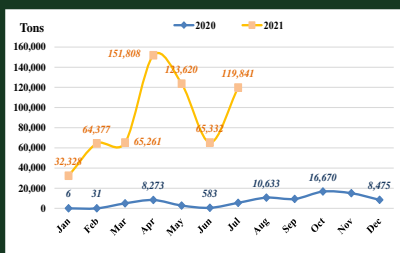


Figure 2: Monthly quantity of sugar import in 2020 - 2021

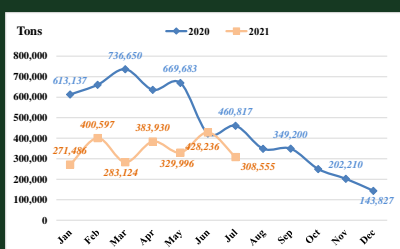


Figure 3: Monthly quantity of sugar export in 2020 - 2021

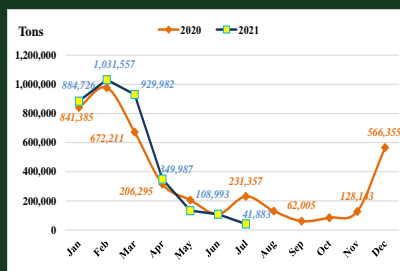


Figure 4: Monthly quantity of cassava import in 2020 - 2021

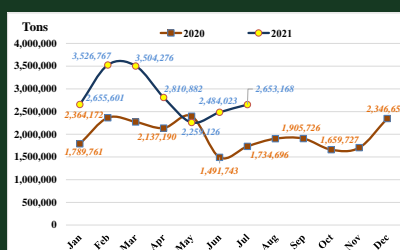


Figure 5 Monthly quantity of cassava export in 2020 - 2021:

The weather in Thailand in 2021(2020/2021) comparing to 2020 (2019/2020) has better conditions. Although most of the areas within the country still face drought with rainfall amount ranges from 0.5 to 20 millimeters per day, farmers are still capable to cultivate crops due to the irrigation system which allows the farmers to use water per crops' need. Some **natural disasters** occurred in most areas of the country; however, no significant damage was observed during the planting season. The planted areas in the Northern and Northeastern parts of the country occur with floods. While, some planted areas such as in Phetchabun, Phichit, Nakhon Sawan, Sing Buri, Saraburi, and Chachoengsao are facing drought. Moreover, diseases and pests problems such as the disease in cassava (Cassava Mosaic Disease) are recorded to be spreading in some provinces such as Khon Kaen, Nakhon Ratchasima, Ubon Ratchathani, Lopburi, Chonburi, Sa Kaeo, and Phetchaburi. The disease in sugarcane (White Leaf Disease) in Kanchanaburi province and the pest outbreak in maize (Fall Armyworm) have occurred all over the maize planted areas in the country. For the spread of **COVID-19**, it does not affect the agricultural production as the production begins to come back to the normal state in order to provide enough for the domestic consumption and maintain the food security. In terms of the **import**, maize import rises due to the increase of demand from feed manufacturers and shortage of maize production per domestic consumption in Thailand. The sugarcane import also increases as the domestic production is insufficient for the needs. In addition, the cassava import becomes greater because of the increase in demands from factories which aims to process crops for importing purpose. For soybean, the import decreases as the global production is also decreased. In terms of exporting situation, rice export falls as Thai rice costs more than rice costs from competitive countries. Consequently, trading partner countries have no purchasing power toward Thai rice which is the result of bad economic from COVID-19. Also, the problem in logistics, the shortage of containers, and the high rise of ocean freight charge resulting in the decrease of rice **export** which Thailand is the main producer and exporter. For sugarcane, the export has declined. In the meantime, the export of cassava rises due to the increase of production and the demand from the global market. From these situations, they can be categorized into items as follow.

The planted area and yield of **soybean** in 2021 tend to increase from last year due to favorable weather and government policy. Farmers also take good care of crops from the beginning to harvesting period. The harvesting period of soybean in 2021 is from July 2021 to December 2021 for wet season, January and to May 2022 for dry season.

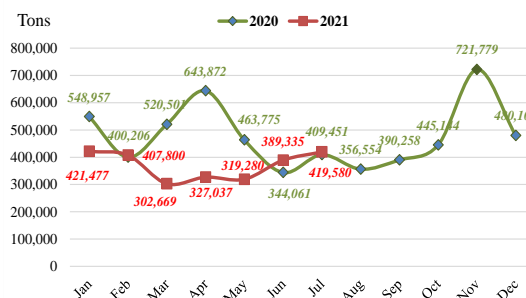


Figure 1: Monthly quantity of rice export in 2020 - 2021

The production situation of **rice** in 2021 (2020/21) is expected to increase from the previous year as there is an income guarantee scheme from government to support rice farmers to mitigate price risks together with favorable weather which increases farmer's incentive to change from growing other crops to rice. Even if drought and flood affect some planted areas which caused damage up to 7,600 hectares, the production in 2021 tends to be better than last year because farmers take good care of rice, use more fertilizers and more rain before harvesting period. The harvesting period of rice in 2021 is around August 2020 to April 2021 for wet season, and February to October 2021 for dry season.

The production situation of **maize** in 2021 is expected to decrease due to the increasing price of competing crop resulted in farmer's incentive to change from growing other crops, and high price maize seed varieties. For maize yield, it decreases due to pet affect from Armyworm occurred in some areas which damaged the planted areas around 13,000 hectares. The harvesting period of maize in 2021 is from June 2020 to February 2021 for wet season, and February to May 2021 for dry season.

For **sugarcane**, the planted area and yield tend to increase because sugarcane price increases together with favorable weather is better than last year although White Leaf disease and drought occurred in some areas which damaged the planted areas around 20,000 hectares. Farmers also take good care of crops, use more fertilizers before harvesting period. The harvesting period of sugarcane in 2021 is from December 2021 to March 2022.

Damaged Area Crop year 2021/22

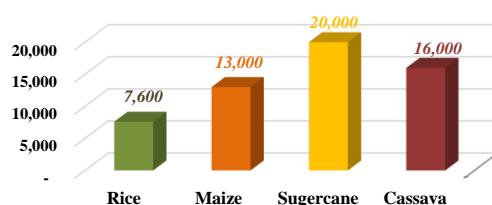


Figure 6: Amount of damaged area in Thailand in 2020 - 2021

The planted area and production of **cassava** are forecasted to increase from last year because the government has an income guarantee scheme to help farmers mitigate risks from price fluctuation. For cassava yield, it tends to rise from last year as farmers have good caring, and reducing of the outbreak of Cassava Mosaic disease which damaged the planted areas around 16,000 hectares and use more fertilizers before harvesting period. The harvesting period of cassava in 2021 is from October 2020 to September 2021.



Crop Situation in Vietnam 2021



Cassava, domestic supply of cassava is scarce due to the impact of social insulation to prevent the spread of the COVID-19 pandemic. Some tapioca starch factories have stopped their production activities due to low supply of fresh cassava. In addition, prolonged hot weather and development of insects in some main cassava growing areas may affect the starch reserves of cassava tubers at harvest. In the first 7 months of 2021, export value of Vietnam's cassava rose by 25,5% while import value recorded much higher increasing rate at 132,7%.

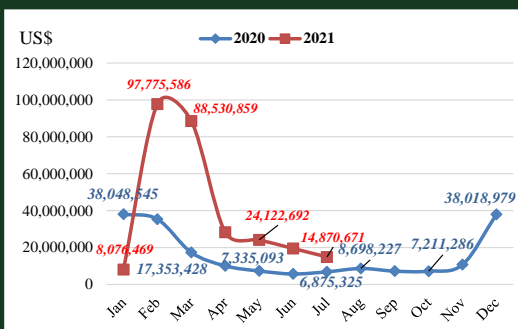


Figure 5: Monthly value of cassava import in 2020 - 2021

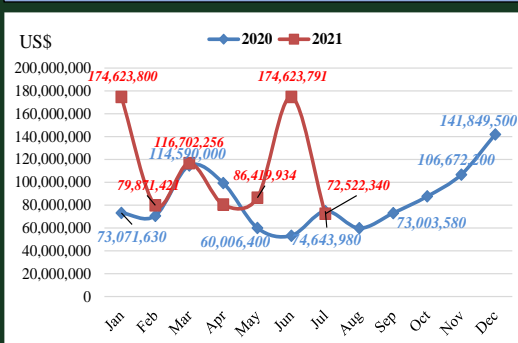


Figure 6: Monthly value of cassava export in 2020 - 2021

The weather of Vietnam, during the first 8 months of 2021, the weather in Vietnam was relatively favorable for crops, except the saltwater intrusion in Mekong River Delta, which might affected rice production. However, it is forecasted that in the next 2 months, Vietnam might witness severe weather conditions such as storms, typhoons, landslides and flood, mostly in the Northern and Central regions of Vietnam, which will affect planted areas and productions of crops. Exports and imports of most of agricultural commodities in Vietnam increased considerably in the first 6 months of 2021. However, during July-August, due to the rapid spread of COVID-19 leading to the government's strict social distancing policy, both agricultural import and export indicator witnessed significant drops. Vietnam's economic activities including agricultural imports and exports are likely to recovered from October when major cities achieve high immunization rates.

Vietnam's weather conditions in 2021 are favorable for rice production. **Rice** yield of Vietnam in 2021 tends to increase compared to the previous year. In terms of trade, the COVID-19 pandemic has affected domestic rice harvesting and circulation activities. The application of Directive 16 in 19 Southern provinces/cities has caused many difficulties for the production, consumption, processing and export value chain of Vietnam's rice industry, leading to the situation congestion in the circulation of rice and goods from the field to the factory and from the factory to the export ports.

Figure 1: Monthly value of rice import in 2020-2021

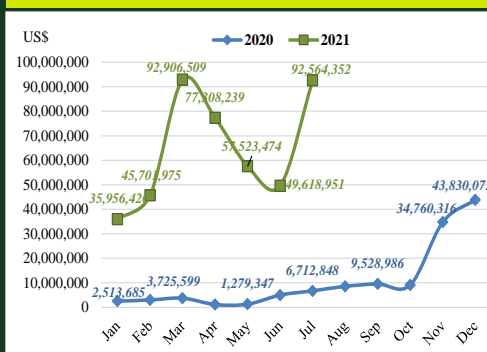
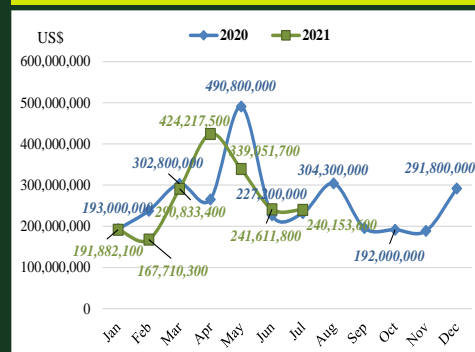


Figure 2: Monthly value of rice export in 2020 - 2021



Vietnam's **sugar** industry in the first months of 2021 continued to record decreases in the output of pressed cane and sugar production. The volume of imported sugar increased sharply while the domestic price of raw **sugarcane** remained low for a long time, making sugarcane farmers unprofitable, leading to the demolition of sugarcane acreage to switch to other crops. Sugarcane's export value decreased by 27,3% while import value increased by 14% in the first 7 months of 2021. To revive the domestic sugar industry, in June 2021, the Ministry of Industry and Trade decided to impose anti-dumping and anti-subsidy duties on imported cane sugar in order to limit sugar imports.

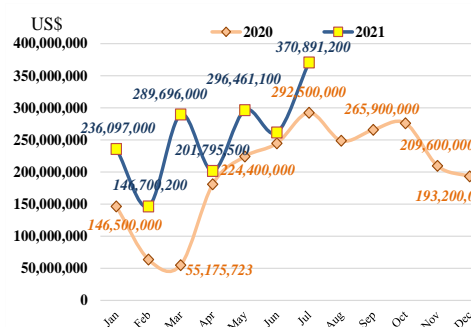


Figure 3: Monthly value of maize import in 2020 - 2021

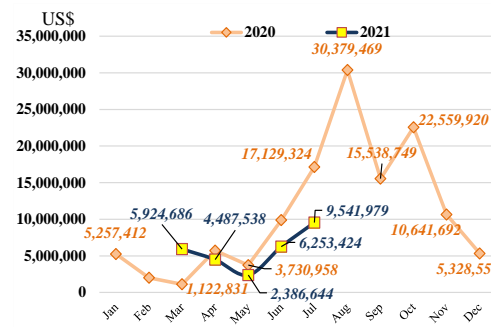


Figure 4: Monthly value of maize export in 2020 - 2021

Vietnam's weather conditions in 2021 are favorable for **maize** and **soybean** productions. The price of imported maize increased by 71.6% in the past half year. This will be an opportunity for domestic farmers to increase the area planted to maize.

