ASEAN FOOD SECURITY INFORMATION SYSTEM (AFSIS) PROJECT

Report on

ASEAN Agricultural Commodity Outlook

No. 5 December 2010

Released by
ASEAN Food Security Information and Training (AFSIT) Center
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
http://afsis.oae.go.th

PREFACE

The ASEAN Food Security Information System (AFSIS) Project publishes the Agricultural Commodity Outlook (ACO) Report semi-annually. The contents of the report include national and regional information on production, utilization, stock, trade and FOB prices. The explanation for significant changes and unusual phenomena were also provided in the Report. The Project plans to increase the number of commodities in ACO report gradually to ultimately cover at least 5 major food crops namely rice, maize, soybean, sugarcane and cassava.

The first and the second Reports focused only on rice. The third Report, maize has been included. The forth Report, sugarcane has been included. This fifth report contains information of 4 commodities which are rice, maize, sugarcane and soybeans. The information was mainly gathered from Member States through the submission of respective National ACO Reports. The Report was scrutinized by the ACO Committee comprises national experts nominated by ASEAN Countries before publication.

The ASEAN Food Security Information and Training (AFSIT) Center, the Secretariat Unit of the Project, would like to thank all Member States and delegates who participated in the ACO Committee Meeting during 20 - 21 December 2010 in Pattaya, Thailand for the provision of additional information and revision of this Report. The list of delegates in the Meeting is presented in the ANNEX 5.

The AFSIT Center would like to record its appreciation to the MAFF Japan, Committee, Focal Point of each Member State and other concerned parties including Dr. Apichart Pongsrihadulchai, AFSIS Consultant on ACO Report development, for their support to the implementation of the AFSIS Project and the development of this Report.

Content

List of Tables

List of Tables (Continued)

List of Figures

List of Figures (Continued)

List of Figures (Continued)

ASEAN Agricultural Commodity Outlook

ASEAN Food Security Information and Training Center
Office of Agricultural Economics
Ministry of Agriculture and Cooperatives
Bangkok, Thailand
http://afsis.oae.go.th

No. 5 December 2010

Highlights of Rice Outlook

- Rice supply in ASEAN is forecast to increase about 0.97 percent from 154.09 million tons of milled rice in 2010 to 155.58 million tons in 2011.
- The increase in supply is mostly due to the increase in stock carried over from previous year while the production has increased only 0.45 percent.
- The rice production in 2011 is forecast to be 127.35 million tons, up from 126.78 million tons in 2010.
- The beginning stock of 2011 is estimated at 25.62 million tons up from 24.0 million tons in 2010 which is about 6.75 percent while the ending stock is forecast to increase from 25.62 million tons to 26.36 million tons during the same period.
- The rice export from ASEAN countries is forecast to decrease from 18.60 million tons in 2010 to 18.52 million tons in 2011 and the rice import by ASEAN countries in 2011 is predicted to decrease from 3.31 million tons to 2.61 million tons.
- The ratio of production to domestic utilization (self-sufficiency ratio) is forecast to change very little from 115.38 percent in 2010 to 115.04 percent in 2011 which indicates that, aggregately, ASEAN is self sufficient in terms of rice production.
- The ratio of beginning stock to domestic utilization (food security ratio) is expected to increase from 21.84 percent in 2010 to 23.14 percent in 2011 which means that, aggregately, ASEAN as a whole has no problem in terms of rice security.

Table 1 Summary of the ASEAN rice situation, 2010-2011 (milled rice)

Items	**2010**	**2011**	**Change**	
			Quantity	%
Supply (Million tons)	154.09	155.58	1.49	0.97
Beginning stock	24.00	25.62	1.62	6.75
Production	126.78	127.35	0.57	0.45
Import	3.31	2.61	-0.70	-21.15
Demand (Million tons)	154.09	155.58	1.49	0.97
Domestic utilization	109.88	110.70	0.82	0.75
Export	18.60	18.52	-0.08	-0.43
Ending stock	25.62	26.36	0.74	2.89
Ratio of production to domestic utilization (%)	115.38	115.04	-0.34	-0.29
Ratio of beginning stock to domestic utilization (%)	21.84	23.14	1.30	5.95

ASEAN Rice Situation in 2010

Production

The estimate of paddy production in ASEAN for 2010 (crop year 2009/10) was 199.49 million tons, an increase of 3.39 million tons which is about 1.73 percent from 196.10 million tons in 2009. The present production estimate of 2010 has been revised upward from 198.4 million tons in EWI report in September 2010.The increase in production was mainly due to the expansion of the planted area. The production has increased in every country except the Philippines. (Table 2, Figure 1).

In **Brunei**, there are two rice crops. For the major crop the planted area has increased due to various government policies such as buy-back program, improvement of infrastructure and technical support as well as open up the new area. For the second (minor) crop, the planted area has decreased due to the unfavorable weather. The total area harvested in 2010 is higher than total area harvested in 2009 which was damaged due to the flood and pest. The yield has decreased due to unfavorable weather. (Table 3-6, Figure 2-4).

For **Cambodia**, the increase in production attributed to the increase in both planted area and yield. The expansion of planted area came from the government program which promoted and guided the private sector in agricultural investment. The increase in yield was due to the farmers used more fertilizer and use more improved varieties as well as the favorable weather.

For **Indonesia**, the increase in total harvested area was dominated by the increase in the third crop even though the harvested area of the first and the second crop has decreased. The increase in the area of the third crop was a result of government policy and good price received by the farmers together with favorable weather. The average yield in the first and third crops has increased due to the farmers use more improved varieties and good practice and proper use of input by the farmer. The favorable weather has also contributed to the increase in yield. However, the decrease of the production in the first and second crops due both the decrease of harvested area in the first and second crops and also caused of the decrease of the yield in the second crops. The harvested area of the first and second crop has decreased due to the unfavorable weather.

In **Lao PDR**, the increase in production was dominated by the increase in yield while the area has decreased. The decrease in area has occurred in major crop due to the drought during planting period while the second crop the area has increased due to the better price received by farmers. The yield has increased in the first crop due to the favorable weather during growing stage. For the second crop, the yield has decreased due to the flood and the drought. However, aggregately, the average yield has increased which led to the increase in production even through the harvested area has decreased.

In **Malaysia,** the increase in production is attributed to the increase in yield while the area has decreased slightly. There are two rice crops in Malaysia. The area of the first crop has expanded due to the good price and good weather. On the other hand, the area of second crop has decreased due to the unfavorable weather. The yield for the first crops has increased due to the government policy that encouraged the farmers to practice better farm management through more efficient use of inputs to increase soil fertility, land leveling, better utilization of water resources, improving the irrigation system and use of certified seeds while the yield of the second crop has decreased due to the drought.

For **Myanmar**, the increase in production is attributed to the increase in yield only since both planted areas and harvested area has declined. For the first (major) crop, the planted area has decreased due to the unfavorable weather and the harvested area for the first crop has decreased as a result of both flood and drought. For the second (minor) crop, the planted area has increased because of the good weather.

In **the Philippines,** the decrease in production was due to the decrease in area as a result of the El Niño effect. The average yield, however, has increased because of the increase in yield of the second crop which has recovered from the previous year damage caused by typhoons Ondoy and Pepeng.

For **Thailand**, the increase in production attributed to the increase in area as a result of the high price received by the farmers under the income guarantee scheme of the government. The yield has decreased due to the drought and pests.

For **Vietnam**, the increase in production was derived from the increase in both area and yield. The expansion of the area was due to the farmers' response to profitable prices. The increase in yield was due to the farmer use more proper inputs and better taking care of the rice crop.

Utilization and Stock

The domestic utilization of rice in ASEAN in 2010 (calendar year) was estimated at 109.88 million tons of milled rice (Table 7). The ratio of production to domestic utilization (self-sufficiency ratio) for 2010 was 115.38 percent (Table 9, Figure 12) compared with 117.1 in 2009. This implied that although self sufficiency ratio has reduced slightly, ASEAN as a whole still produced 15.38 percent more than utilization within the region. However, on a country by country basis, Brunei, Malaysia and the Philippines have ratio less than 100 percent which indicated that these countries produced rice not sufficient for domestic utilization. Singapore imported all rice for domestic consumption and for re-export. The highest self-sufficiency ratio was in Thailand, Cambodia and Vietnam respectively.

The beginning stock of rice in ASEAN in 2010 was estimated at 24.0 million tons while the ending stock was estimated at 25.62 million tons. Thailand, Indonesia, Vietnam and Myanmar carried most of the rice stock in the region and these countries have stock above 4 million tons. Four countries together have stock about 83 percent of the stock of the region (Table 7, Figure 11). The ratio of beginning stock to domestic utilization (food security ratio) in ASEAN was 21.8 percent (Table 10) compared with 19.4 in 2009. This is in a better situation in terms of rice security for the region.

Trade

In 2010, ASEAN altogether is expected to export about 18.60 million tons of milled rice (Table 7, Figure 5 and 6). Thailand and Vietnam, the two major exporting countries, are expected to export about 8.94 million tons and 6.75 million tons, respectively. Cambodia and Myanmar, on the other hand are expected to export about 1.70 million tons and 1.0 million tons, respectively.

For the imports, ASEAN as a whole is expected to import about 3.31 million tons. The major importing countries are the Philippines and Malaysia which are expected to import about 2.23 million tons and 0.78 million ton, respectively (Table 7, Figure 8 and 9).

Prices

The annual average FOB prices in 2010 for the same grade of rice in all exporting countries were higher than in 2009, except for 5% broken rice of Thailand which was priced lower. Comparing FOB prices of 5% broken rice among these exporting countries, Cambodia received the highest price, followed by Thailand and Vietnam.

For Malaysia the average CIF prices of rice in 2010 are the same as compared to 2009 prices. For the Philippines, the average CIF prices of all kinds of rice in 2010 are higher than in 2009.

The FOB and CIF prices of major exporting and importing countries in the ASEAN in 2008-2010 are shown in Table 11-12 and Figure 14-15.

Damaged Area

The damaged area for rice in ASEAN in 2010 was reported at 758,866 hectares (Table 6). When separated by the cause of damage it was found that the major cause came from pests which occurred in Thailand. The other causes of damaged were drought and flood. The drought was occurred the most in Thailand. For the flood was occurred in many countries which Indonesia and Cambodia are the two countries affected by the flood. No damage area was reported by Vietnam.

Prospects for Rice in 2011

Production

Paddy production of ASEAN in 2011 is forecast to be 204.6 million tons, up 5.10 million tons or 2.55 percent as compared to 199.49 million tons in 2010 (Table 2, Figure 1). The production is predicted to increase in most countries except Thailand and Vietnam, the two major exporting countries. In Thailand the decrease in production was due to the reduction in area as a result of the drought during the growing period of the first crop. The government has encouraged the farmers to postpone their planting dates for 2 months because of the water shortage and did not have enough rain. In Vietnam, the decrease in area was due to the unfavorable weather and the increase in prices of competing crops. For other countries, the production are expected to increase due to the food security policies of the governments and the high prices received by the farmers in the previous year.

Utilization and Stock

The domestic utilization of rice in ASEAN in 2011 is forecast to be 110.70 million tons, an increase of about 0.82 million tons or 0.75 percent from 109.88 million tons in 2010. (Table 7 and 8).

The beginning stock in ASEAN is estimated to increase to 25.62 million tons which is 1.62 million tons or 6.75 percent higher than the 24.0 million tons in 2010. The ending stock is also expected to increase by 0.74 million tons or 2.89 percent from 25.62 million tons in 2010 to 26.36 million tons in 2011 (Table 7 and 8, Figure 11). The increase in ending stock is due to the increase in both beginning stock and production.

The ratio of production to domestic utilization (self–sufficiency ratio) is forecast to decrease slightly from 115.38 percent in 2010 to 115.04 percent in 2011 (Table 9, Figure 12). So the self–sufficiency situation for the ASEAN is relatively the same.

The ratio of rice stock to domestic utilization (food security ratio) is forecast to increase significantly from 21.84 percent in 2010 to 23.14 percent in 2011 (Table 10, Figure 13). This implies that the food security situation in most countries of the region is expected to improve in 2011. Only Indonesia, Lao PDR, Cambodia and Singapore have the ratio less than 20 percent which is too risky in terms of rice security.

Trade

Rice export from ASEAN in 2011 is expected to decrease from 18.60 million tons in 2010 to 18.52 million tons in 2011 (Table 7 and 8, Figure 5 and 7). The increase in export is expected in Thailand Cambodia and Laos while Vietnam and Myanmar are expected to be the same or change very little from previous year.

For import, ASEAN as a whole is expected to import about 2.61 million tons, about 0.70 million tons less than previous year (Table 7 and 8, Figure 8 and 10). The reduction in import in ASEAN is due to the reduction of import by the Philippines.

Table 2 Paddy production in ASEAN countries, 2009-2011

Unit : 1,000 Tons

Country	2009 (2008/09)	2010 (2009/10)	change 2010 over 2009		2011 (2010/11)	change 2011 over 2010	
			Quantities	(%)		Quantities	(%)
ASEAN	**196,101.99**	**199,493.31**	**3,391.32**	**1.73**	**204,589.64**	**5,096.33**	**2.55**
Brunei	1.37	1.62	0.25	18.44	1.93	0.31	18.86
Cambodia	7,175.47	7,585.87	410.40	5.72	7,962.47	376.60	4.96
Indonesia	64,398.89	65,980.65	1,581.76	2.46	67,631.46	1,650.81	2.50
Lao PDR	3,144.80	3,146.79	1.99	0.06	3,450.00	303.21	9.64
Malaysia	2,511.04	2,548.31	37.27	1.48	2,665.10	116.79	4.58
Myanmar	32,057.87	32,240.38	182.51	0.57	35,313.29	3,072.91	9.53
Philippines	16,266.42	16,021.83	-244.59	-1.50	16,973.27	951.45	5.94
Singapore	-	-	-	-	-	-	-
Thailand	31,650.63	32,116.06	465.43	1.47	31,692.75	-423.32	-1.32
Vietnam	38,895.50	39,851.80	956.30	2.46	38,899.37	-952.43	-2.39

Table 3 Paddy planted area in ASEAN countries, 2009-2011

Unit : 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change 2010 over 2009		2011 (2010/11)	change 2011 over 2010	
			Quantities	(%)		Quantities	(%)
ASEAN	**48,469.59**	**49,759.51**	**1,289.92**	**2.66**	**49,812.66**	**53.14**	**0.11**
Brunei	1.73	1.65	-0.08	-4.54	1.93	0.28	16.81
Cambodia	2,616.53	2,720.38	103.85	3.97	2,762.84	42.46	1.56
Indonesia	12,948.59	13,812.35	863.76	6.67	13,770.26	-42.09	-0.30
Lao PDR	904.28	895.46	-8.82	-0.97	925.00	29.54	3.30
Malaysia	674.93	673.75	-1.18	-0.18	683.68	9.93	1.47
Myanmar	8,094.30	8,066.65	-27.65	-0.34	8,107.90	41.24	0.51
Philippines	4,617.18	4,435.58	-181.60	-3.93	4,552.14	116.56	2.63
Singapore	-	-	-	-	-	-	-
Thailand	11,171.96	11,635.19	463.23	4.15	11,619.43	-15.76	-0.14
Vietnam	7,440.10	7,518.50	78.40	1.05	7,389.48	-129.02	-1.72

Table 4 Paddy harvested area in ASEAN countries, 2009-2011

Unit : 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change 2009 over 2008		2011 (2010/11)	change 2010 over 2009	
			Quantities	(%)		Quantities	(%)
ASEAN	**47,775.96**	**48,333.49**	**557.53**	**1.17**	**48,889.10**	**555.61**	**1.15**
Brunei	1.06	1.55	0.49	46.29	1.74	0.18	11.84
Cambodia	2,613.36	2,674.60	61.24	2.34	2,742.64	68.04	2.54
Indonesia	12,883.58	13,031.85	148.28	1.15	13,398.39	366.54	2.81
Lao PDR	872.90	870.83	-2.06	-0.24	925.00	54.17	6.22
Malaysia	671.49	668.64	-2.85	-0.42	678.23	9.58	1.43
Myanmar	8,077.61	8,059.47	-18.14	-0.22	8,074.48	15.01	0.19
Philippines	4,532.31	4,366.64	-165.67	-3.66	4,552.14	185.50	4.25
Singapore	-	-	-	-	-	-	-
Thailand	10,683.55	11,141.39	457.85	4.29	11,127.01	-14.38	-0.13
Vietnam	7,440.10	7,518.50	78.40	1.05	7,389.48	-129.02	-1.72

Note: Vietnam reported only planted area.

Table 5 Paddy yield in ASEAN countries, 2009-2011

Unit : Tons/Hectare

Country	2009 (2008/09)	2010 (2009/10)	change *2009 over 2008*		2011 (2010/11)	change *2010 over 2009*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**4.10**	**4.13**	**0.03**	**0.73**	**4.18**	**0.05**	**1.21**
Brunei	1.29	1.05	-0.24	-18.60	1.11	0.06	5.71
Cambodia	2.75	2.84	0.09	3.27	2.90	0.06	2.11
Indonesia	5.00	5.06	0.06	1.20	5.05	-0.01	-0.20
Lao PDR	3.60	3.61	0.01	0.28	3.73	0.12	3.32
Malaysia	3.74	3.81	0.07	1.87	3.93	0.12	3.15
Myanmar	3.97	4.00	0.03	0.76	4.37	0.37	9.25
Philippines	3.59	3.67	0.08	2.23	3.73	0.06	1.63
Singapore	-	-	-	-	-	-	-
Thailand	2.96	2.88	-0.08	-2.70	2.85	-0.03	-1.04
Vietnam	5.23	5.30	0.07	1.34	5.26	-0.04	-0.75

Note: Yield related to harvested area except Vietnam which related to planted area.

Table 6 Paddy damaged area in ASEAN by cause of damage, 2010

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Others	Total
ASEAN	**137,240**	**255,721**	**364,878**	**816**	**212**	**758,866**
Brunei	40	20	19	21	-	99
Cambodia	40,027	5,681	69	-	-	45,777
Indonesia	66,107	41,912	5,766	0	0	113,785
Lao PDR	3,654	18,423	2,104	n.a.	-	24,181
Malaysia	1,058	885	2,366	795	-	5,104
Myanmar	5,862	1,111	-	-	212	7,185
Philippines	9,757	59,179	0	0	0	68,936
Singapore	-	-	-	-	-	-
Thailand	10,735	128,510	354,554	0	0	493,799
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Note: n.a. = not available

: Damaged area refers to the accumulate damage from the beginning of crop year to November 2011

Table 7 Rice balance sheet of ASEAN countries, 2010 (milled rice)

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**23,999,805**	**126,783,283**	**3,311,418**	**154,094,506**	**109,883,545**	**18,595,035**	**25,615,926**	**154,094,506**
Brunei	16,318	1,056	31,499	48,873	31,760	-	17,113	48,873
Cambodia	322,303	4,854,957	-	5,177,260	2,961,392	1,699,235	516,633	5,177,260
Indonesia	2,376,810	41,699,783	508	44,077,101	38,999,781	131,485	4,945,835	44,077,101
Lao PDR	139,510	1,886,880	22,290	2,048,680	1,747,787	40,974	259,919	2,048,680
Malaysia	725,775	1,641,985	780,000	3,147,760	2,470,558	-	677,202	3,147,760
Myanmar	4,290,464	20,311,437	nil	24,601,901	19,592,784	1,000,000	4,009,117	24,601,901
Philippines	2,629,100	10,414,186	2,228,910	15,272,196	12,503,335	216	2,768,645	15,272,196
Singapore	40,000	-	248,211	288,211	208,716	29,495	50,000	288,211
Thailand	7,702,346	21,196,602	nil	28,898,948	12,120,000	8,939,630	7,839,318	28,898,948
Vietnam	5,757,179	24,776,397	nil	30,533,576	19,247,432	6,754,000	4,532,144	30,533,576

Table 8 Rice balance sheet of ASEAN countries, 2011 (milled rice)

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**25,615,926**	**127,354,207**	**2,609,308**	**155,579,442**	**110,701,224**	**18,515,209**	**26,363,009**	**155,579,442**
Brunei	17,113	1,255	32,444	50,813	32,880	-	17,933	50,813
Cambodia	516,633	5,095,983	-	5,612,616	3,035,913	1,782,043	794,660	5,612,616
Indonesia	4,945,835	42,131,508	508	47,077,851	39,445,800	131,485	7,500,566	47,077,851
Lao PDR	259,919	1,936,458	26,356	2,222,733	1,806,474	66,681	349,578	2,222,733
Malaysia	677,202	1,688,110	750,000	3,115,312	2,510,669	-	604,643	3,115,312
Myanmar	4,009,117	20,357,372	-	24,366,489	19,752,537	1,000,000	3,613,952	24,366,489
Philippines	2,768,645	11,032,626	1,500,000	15,301,271	12,796,776	n.a.	2,504,495	15,301,271
Singapore	50,000	-	300,000	350,000	270,000	35,000	45,000	350,000
Thailand	7,839,318	20,917,212	nil	28,756,530	12,084,000	9,500,000	7,172,530	28,756,530
Vietnam	4,532,144	24,193,683	-	28,725,827	18,966,175	6,000,000	3,759,652	28,725,827

Note: n.a. = not available, nil = very small amount

Table 9 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

Unit : Ton

Country	2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**126,783,283**	**109,883,545**	**115.38**	**127,354,207**	**110,701,224**	**115.04**
Brunei	1,056	31,760	3.32	1,255	32,880	3.82
Cambodia	4,854,957	2,961,392	163.94	5,095,983	3,035,913	167.86
Indonesia	41,699,783	38,999,781	106.92	42,131,508	39,445,800	106.81
Lao PDR	1,886,880	1,747,787	107.96	1,936,458	1,806,474	107.20
Malaysia	1,641,985	2,470,558	66.46	1,688,110	2,510,669	67.24
Myanmar	20,311,437	19,592,784	103.67	20,357,372	19,752,537	103.06
Philippines	10,414,186	12,503,335	83.29	11,032,626	12,796,776	86.21
Singapore	-	208,716	-	-	270,000	-
Thailand	21,196,602	12,120,000	174.89	20,917,212	12,084,000	173.10
Vietnam	24,776,397	19,247,432	128.73	24,193,683	18,966,175	127.56

Table 10 Ratio of rice beginning stock to domestic utilization in ASEAN countries (Food security ratio)

Unit : Ton

Country	2010			2011		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**23,999,805**	**109,883,545**	**21.84**	**25,615,926**	**110,701,224**	**23.14**
Brunei	16,318	31,760	51.38	17,113	32,880	52.05
Cambodia	322,303	2,961,392	10.88	516,633	3,035,913	17.02
Indonesia	2,376,810	38,999,781	6.09	4,945,835	39,445,800	12.54
Lao PDR	139,510	1,747,787	7.98	259,919	1,806,474	14.39
Malaysia	725,775	2,470,558	29.38	677,202	2,510,669	26.97
Myanmar	4,290,464	19,592,784	21.90	4,009,117	19,752,537	20.30
Philippines	2,629,100	12,503,335	21.03	2,768,645	12,796,776	21.64
Singapore	40,000	208,716	19.16	50,000	270,000	18.52
Thailand	7,702,346	12,120,000	63.55	7,839,318	12,084,000	64.87
Vietnam	5,757,179	19,247,432	29.91	4,532,144	18,966,175	23.90

Table 11 FOB Price of rice in selected ASEAN countries

Unit : US$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	Milled Rice 5%	2008	404	510	515	760	828	897	796	725	738	666	702	684	685
		2009	553	587	588	566	549	654	585	553	587	547	594	587	579
		2010	541	550	535	560	555	650	590	540	560	650	700	710	595
Myanmar	Milled Rice 25%	2008	277	287	305	323	319		380	415	448	380	325	304	342
		2009	288	283	286	283	298	318	311	320	311	305	314	321	303
		2010	330	336	351	345	346	340	337	331					340
Thailand	Hommali Rice	2008	672	739	821	1,103	1,205	1,079	991	924	883	820	795	805	903
		2009	865	862	865	876	887	901	941	956	1,013	1,045	1,063		934
		2010	1,009	1,000	987	984	971	949	982	1,005	1,093	1,127	1,135	1,123	1,030
	Milled Rice 5%	2008	389	454	554	833	973	854	814	764	749	667	576	566	683
		2009	581	594	608	558	526	551	556	535	528	499	527	588	554
		2010	570	542	498	459	447	445	438	454	485	493	524	547	492
Vietnam	Milled Rice 5%	2008	355	425	510	489	565	802	823	764	617	478	459	422	559
		2009	397	400	409	417	426	410	396	398	372	389	411	475	408
		2010	538	581	539	498	459	430	421	372	426	463	467		472

Table 12 CIF Price of rice in selected ASEAN countries

Unit : US$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Philippines	Milled Rice 5%	2008			280				840	750	710	520			620
		2009	-	613	628	603	614	577	-	543	528	501	-	535	571
		2010	646	703	743	713	699	683	736						703
	Rice 10%-25%	2009			288	261	396	453	477	445		272		551	393
		2010	365	676		462		448	422						475
	Broken rice	2009			70	396	247	387	447	454		72			296
		2010			546	481	375		448						463
Malaysia	Not specified	2008	493	518	755	992	749	869	876	767	621	950	546	536	723
		2009	480	500	520	490	490	560	530	520	480	620	540	480	518
		2010	540	550	546	489	546	476	496	463					513
Singapore	Not specified	2009	784	791	813	833	804	823	803	819	823	823	787	812	810
		2010	902	877	794	805	816	752	722	779	758	827			803

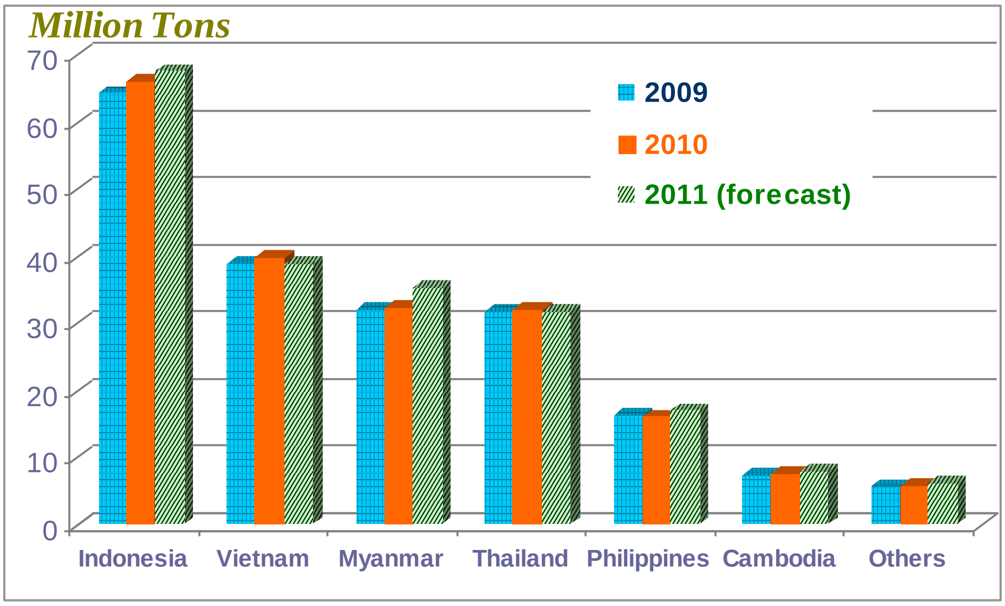


Figure 1 Paddy production of selected countries in ASEAN, 2009-2011

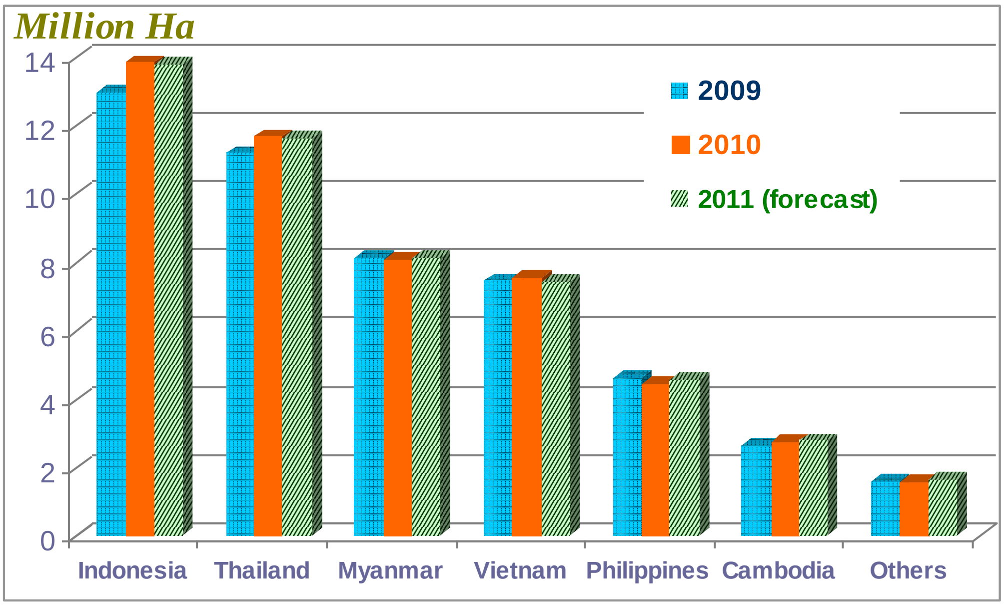


Figure 2 Paddy planted area of selected countries in ASEAN, 2009-2011

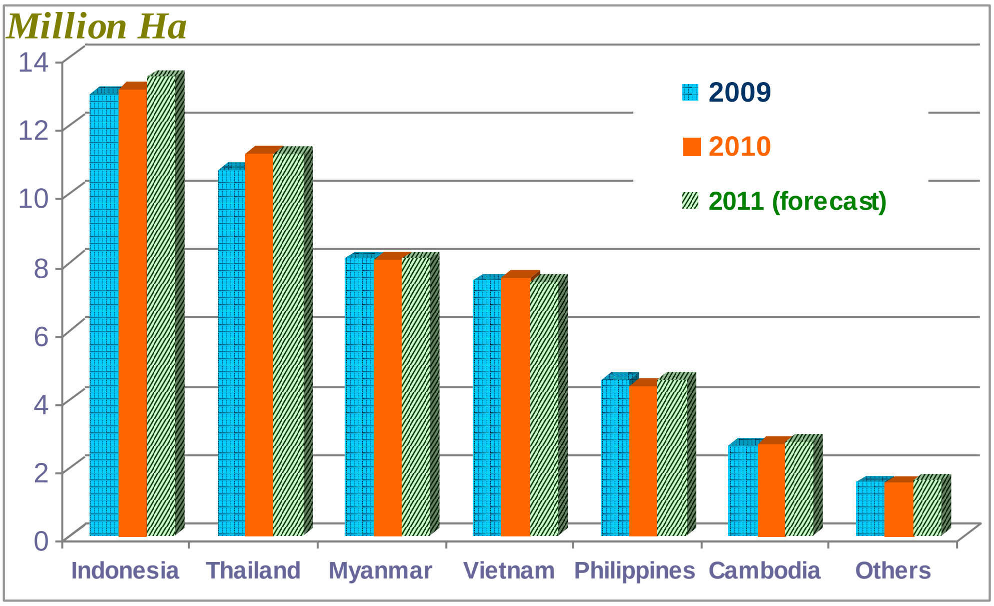


Figure 3 Paddy harvested area of selected countries in ASEAN, 2009-2011

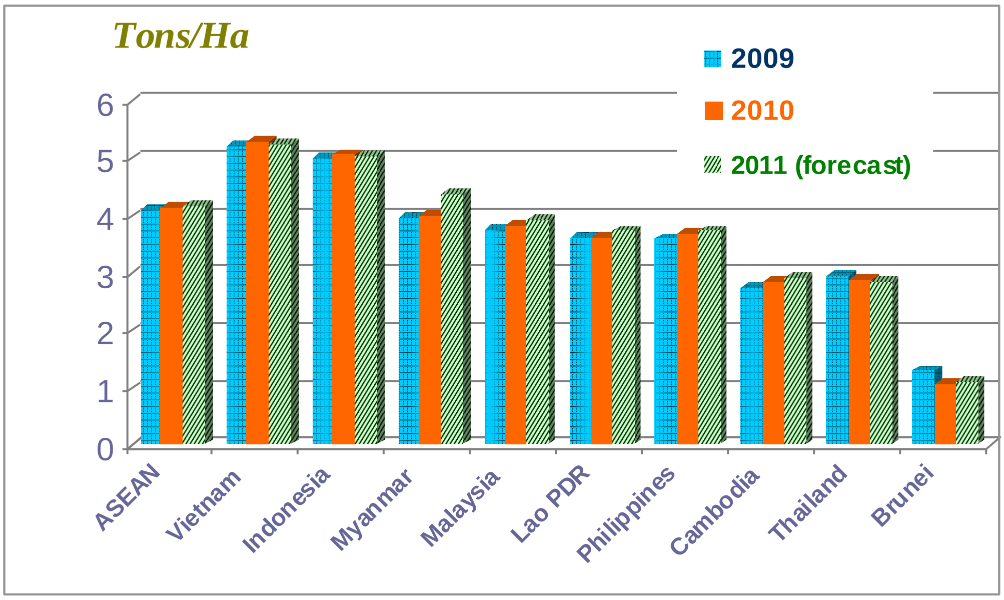


Figure 4 Paddy yield of selected countries in ASEAN, 2009-2011

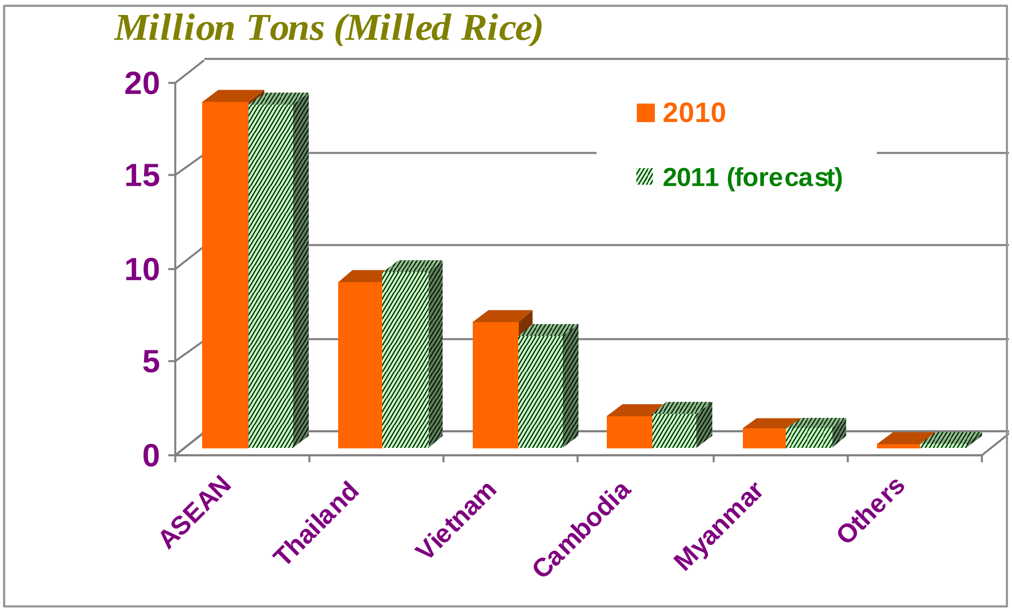


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2010-2011

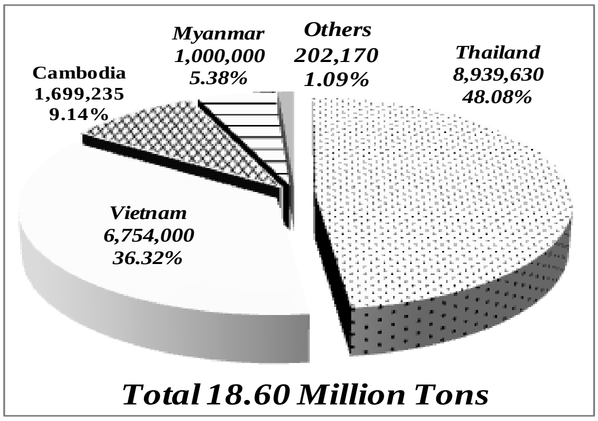


Figure 6 Share of rice export (tons) among ASEAN countries, 2010

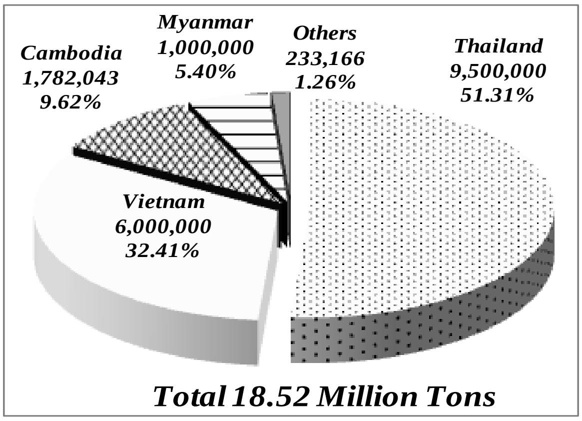


Figure 7 Share of rice export (tons) among ASEAN countries, 2011

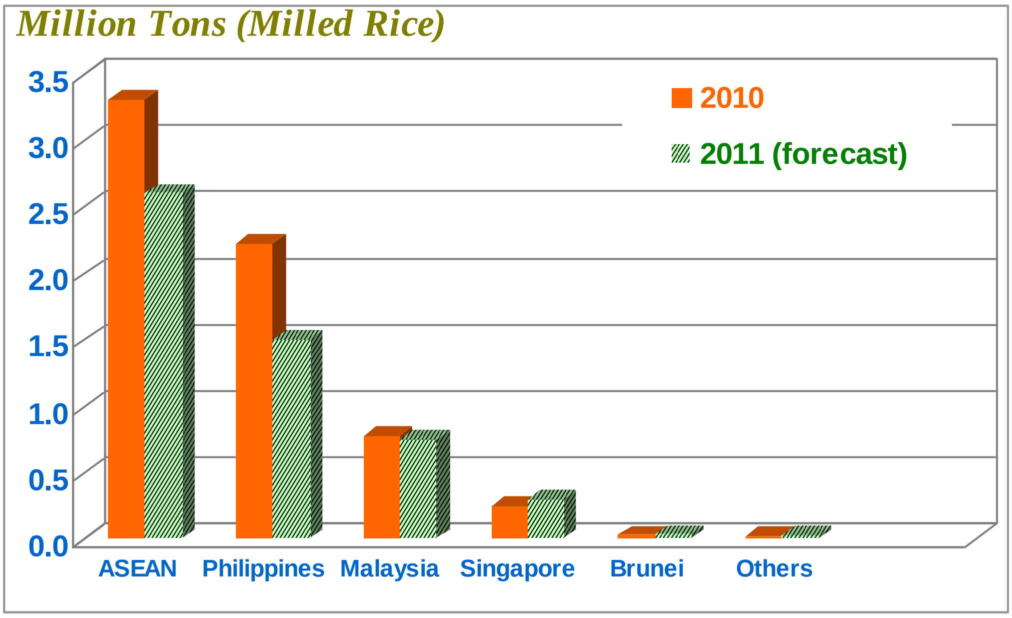


Figure 8 Amount of rice import (million tons) by selected countries in ASEA in 2010-2011

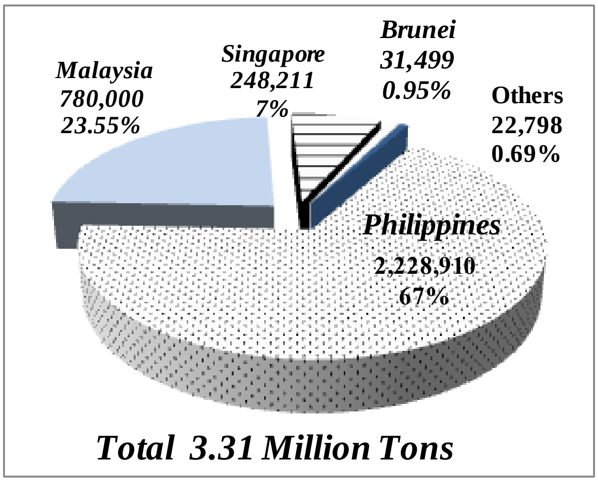


Figure 9 Share of rice import (ton) among ASEAN countries, 2010

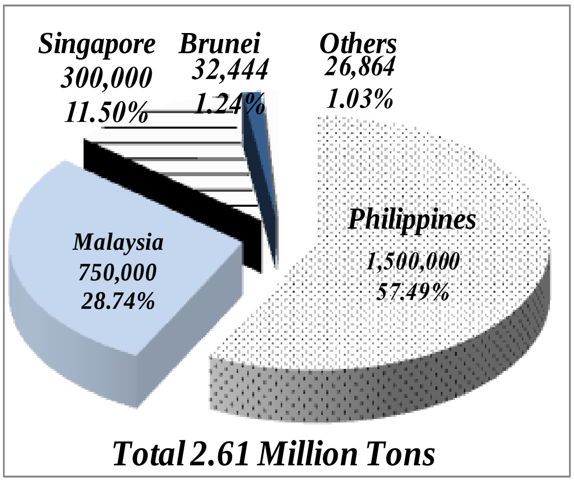


Figure 10 Share of rice import (ton) among ASEAN countries, 2011

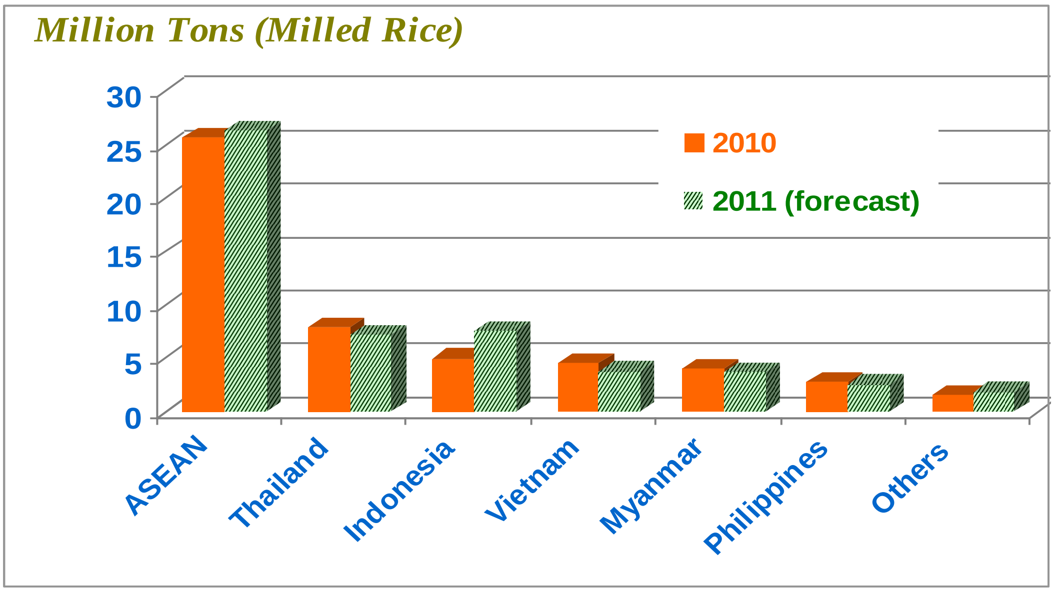


Figure 11 Amount of ending stock of rice in ASEAN countries

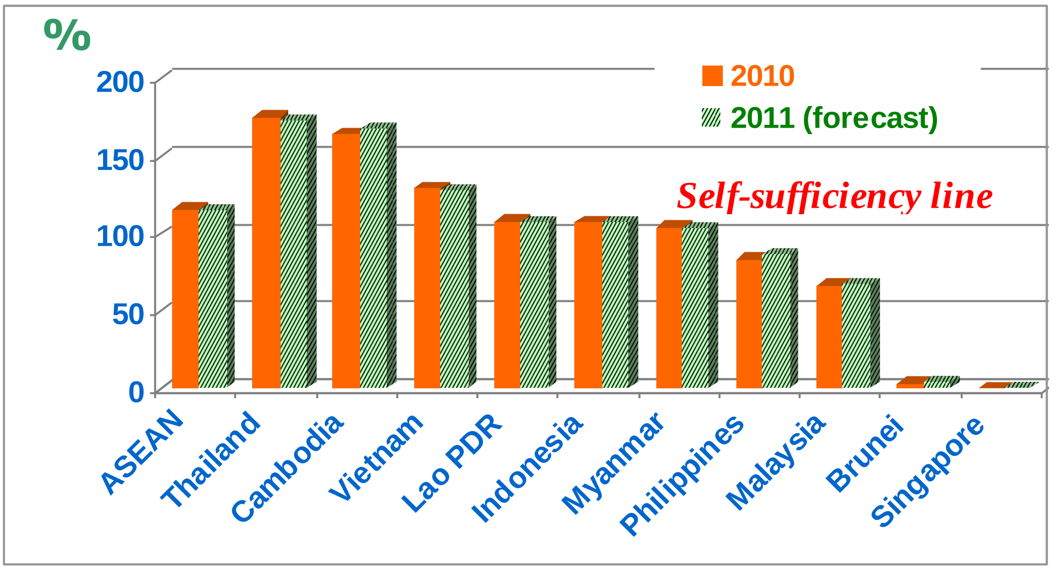


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

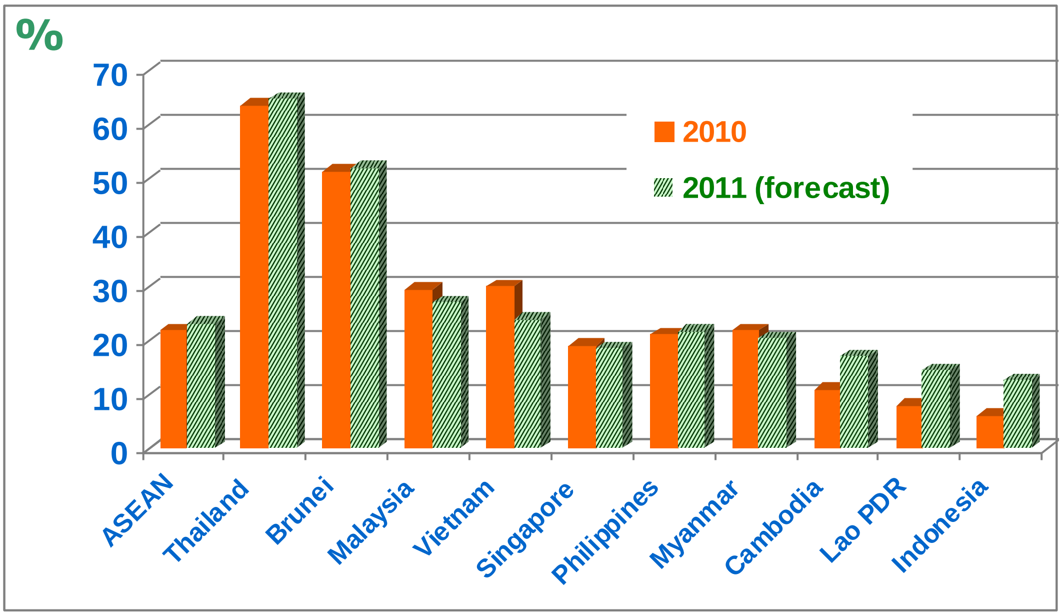


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries (Food security ratio)

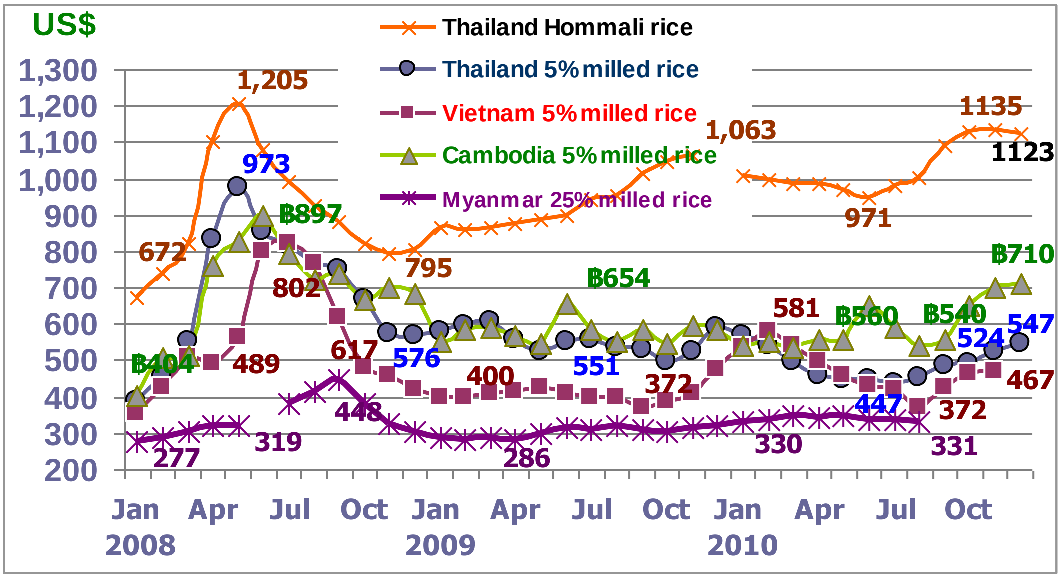


Figure 14 FOB price (US$) of milled rice of selected countries in ASEAN in 2008-2010

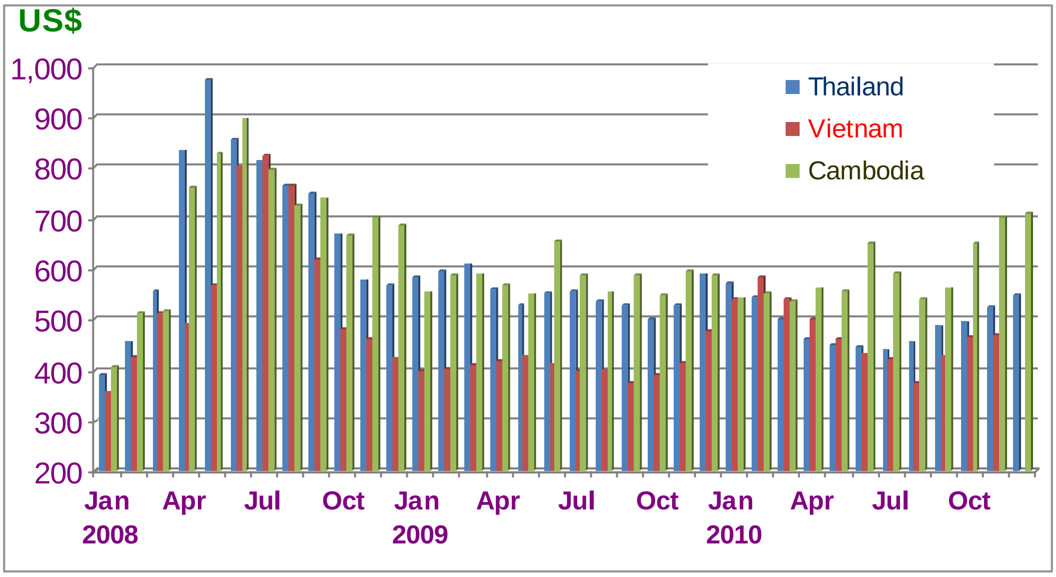


Figure 15 FOB price (US$) of 5% milled rice of selected countries in ASEAN in 2008-2010

Highlights of Maize Outlook

- Maize supply in ASEAN is forecast to increase about 8.15 percent from 44.28 million tons in 2010 (crop year 2009/10) to 47.89 million tons in 2011(crop year 2010/11). The increase in maize supply comes from the increase in both production and the stock carried over from the previous year.
- The maize production is forecast to increase from 36.06 million tons in 2010 to 39.25 million tons in 2011 which is about 8.84 percent due to the expansion of planted area and the increase in the yield. The increase in planted area is about 9.65 percent while the average yield is forecast to increase about 2.67 percent.
- The maize export from ASEAN is expected to increase by about 28.85 percent, from 1.04 million tons to 1.34 million tons. The import is predicted to decrease from 4.69 million tons to 4.37 million tons during the same period.
- The beginning stock is estimated to increase considerably from 3.53 million tons in 2010 to 4.26 million tons which is about 20.68 percent while the ending stock is forecast to increase from 4.26 million tons to 6.43 million tons, an increase of about 50.94 percent during the same period.
- The ratio of production to domestic utilization (self-sufficiency ratio) in 2011 is forecast to change from 92.54 percent in 2010 to 97.84 percent. The ratio of stock to domestic utilization (food security ratio) is forecast to increase from 9.05 percent in 2010 to 10.63 percent.

Table 13 Summary of the ASEAN maize situation, 2010-2011

Items	2010	2011	Change	
			Quantity	%
Supply (Million tons)	44.28	47.89	3.61	8.15
Beginning stock	3.53	4.26	0.73	20.68
Production	36.06	39.25	3.19	8.85
Import	4.69	4.37	-0.32	-6.82
Demand (Million tons)	44.28	47.89	3.61	8.15
Domestic utilization	38.97	40.12	1.15	2.95
Export	1.04	1.34	0.30	28.85
Ending stock	4.26	6.43	2.17	50.94
Ratio of production to domestic utilization (%)	92.54	97.84	5.30	5.73
Ratio of beginning stock to domestic utilization (%)	9.05	10.63	1.58	17.46

ASEAN Maize Situation in 2010

Production

Maize production in ASEAN in 2010 (crop year 2009/10) was estimated at 36.06 million tons, down 0.60 million tons, an decrease of 1.64 percent from 36.67 million tons in 2009 (Table 14, Figure 16). The decrease in production was solely due to the reduction in area while the yield was about the same. The major decrease has occurred most in the Philippines, Cambodia and Thailand. Indonesia ranked first in terms of maize production which produced about half of the total production in ASEAN. The Philippines and Vietnam ranked second and third respectively. Brunei Singapore and Malaysia did not grow maize for feed.

There are two maize crops in **Cambodia.** The production in 2010 has decreased substantially due to the reduction in planted area and yield. Even though the first crop area increased slightly due to higher maize prices and lower prices of competing crops, the planted area of the second (major) crop decreased significantly due to the shortage of water. The average yield has decreased due to the decrease in the yield of the second crop because of drought.

In **Indonesia,** maize production has increased principally due to the increase of yield. The increase in yield resulted from the government program which encouraged farmers to use better quality seeds and employ good farming practices.

In **Lao PDR**, the increase in production was due to the increase in yield. The increased yield of the second crop was caused by the favorable weather while the decreased area was affected by low price received by the farmers.

For **Myanmar**, the increase in production was mainly due to the expansion of area accompanied by a small increase in yield. The favorable weather was the major factor contributing to the increase in area and yield.

For the **Philippines**, the production has declined considerably due to the reduction in area planted and yield both of which were severely affected by El Niño phenomenon.

In **Thailand**, even though the area planted has increased slightly, the production decreased because of the big drop in yield, especially in the second crop. The decrease in yield was due to the drought and flood.

For **Vietnam**, the increase in production was due to the increase in the area. The increase in the area was impacted by the increase in maize price and the government policy which encouraged farmers to grow maize while the small reduction in yield was because of the unfavorable weather.

Utilization and Stock

The domestic utilization of maize in ASEAN in 2010 (calendar year) was estimated at 38.97 million tons while the production was estimated at 36.06 million tons which indicates that the region is not self-sufficient in maize (Table 19). The ratio of maize production to domestic utilization (self-sufficiency ratio) for ASEAN in 2010 was estimated at 92.54 percent (Table 21, Figure 27).

The beginning stock of maize in 2010 was estimated at 3.53 million tons and the ending stock was estimated at 4.26 million tons (Table 19). Indonesia and Thailand carried most of the stock in the region.

The ratio of maize stock to domestic utilization (food security ratio) in the ASEAN was estimated at 9.05 percent which is higher than 7.8 percent in 2009. Every country has stock lower than 20 percent except Myanmar. (Table 22, Figure 28).

Trade

In 2010, ASEAN altogether exported about 1.04 million tons while imported about 4.6 million tons of maize (Table 19, Figure 21 and 24). Cambodia and Thailand were the two major exporting countries in ASEAN while Malaysia and Vietnam were the two major importing countries. Thailand and Indonesia were considered as both exporting and importing countries in ASEAN. This was due to the fact that for certain period the domestic prices may be higher than imported price. The domestic user preferred the lower imported price while the exporter enjoyed the higher export prices. Since Brunei, Malaysia and Singapore did not produce maize, all maize for feed was imported.

Price

The FOB and CIF prices of maize are shown in Table 23-24 and Figure 29-30. In general, the prices were relatively unchanged except for average 2010 FOB price of Thailand, which was higher than the 2009 price.

Damaged Area

The maize damaged area in 2010 for the whole ASEAN was about 134,615 hectares, mostly due to the drought in the Philippines, Cambodia and Indonesia and floods in Indonesia and Thailand (Table 18).

Prospects for Maize in 2011

Production

ASEAN maize production in 2011 is forecast to be 39.25 million tons, up from 36.06 million tons in 2010, an increase of 3.19 million tons which is about 8.84 percent (Table 14, Figure 16). An increase in production is expected in all countries in the region. The major contribution to the increase in production is projected to come from Indonesia while high percentage increases are expected in Cambodia, Indonesia, the Philippines and Myanmar. The increase in production in most countries is due to the increase in both area and yield except Lao PDR where the yield is expected to be lower than in 2010 (Table 15-17, Figure 17-19).

Utilization and Stock

The domestic utilization of maize is forecast to increase 2.95 percent from 38.97 million tons in 2010 to 40.12 million tons in 2011 (Table 19 and 20). The ratio of production to domestic utilization (self-sufficiency ratio) is expected to increase from 92.54 percent to 97.84 percent, compared to previous year (Table 21, Figure 27). The ratio of beginning stock to domestic utilization (food security ratio) is forecast to increase from 9.05 percent in 2010 to 10.63 percent in 2011(Table 22, Figure 28). For the Philippines, Vietnam, Indonesia and Malaysia the food security ratio is forecast to range from 2.87 to 11.16 percent.

Trade

The 2011 maize export from ASEAN is forecast to be 1.34 million tons up from 1.04 million tons in previous year (Table 19 and 20, Figure 20 and 22). The maize import by ASEAN countries is forecast to be about 4.37 million tons, down from 4.69 million tons for the same period (Table 19 and 20, Figure 23 and 25). Cambodia and Thailand are expected to be the major exporting countries while Malaysia and Vietnam are expected to be the major importing countries.

Table 14 Maize production in ASEAN countries, 2009-2011

Unit : 1,000 Tons

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**36,665.52**	**36,064.98**	**-600.54**	**-1.64**	**39,253.85**	**3,188.87**	**8.84**
Brunei	-	-	-	-	-	-	-
Cambodia	924.03	728.98	-195.06	-21.11	867.00	138.03	18.93
Indonesia	17,629.75	17,844.68	214.93	1.22	19,583.71	1,739.03	9.75
Lao PDR	848.77	936.70	87.93	10.36	1,004.50	67.80	7.24
Malaysia	-	-	-	-	-	-	-
Myanmar	1,184.95	1,225.89	40.93	3.45	1,328.96	103.08	8.41
Philippines	7,034.03	6,350.56	-683.48	-9.72	6,935.37	584.82	9.21
Singapore	-	-	-	-	-	-	-
Thailand	4,612.18	4,451.28	-160.90	-3.49	4,729.30	278.02	6.25
Vietnam	4,431.80	4,526.90	95.10	2.15	4,805.00	278.10	6.14

Table 15 Maize planted area in ASEAN countries, 2009-2011

Unit : 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**9,847.53**	**9,746.77**	**-100.76**	**-1.02**	**10,687.14**	**940.37**	**9.65**
Brunei	-	-	-	-	-	-	-
Cambodia	221.29	208.48	-12.81	-5.79	229.00	20.52	9.84
Indonesia	4,172.19	4,162.43	-9.75	-0.23	4,891.77	729.33	17.52
Lao PDR	175.97	168.83	-7.14	-4.06	205.00	36.17	21.42
Malaysia	-	-	-	-	-	-	-
Myanmar	355.14	362.81	7.67	2.16	384.72	21.91	6.04
Philippines	2,701.09	2,584.52	-116.57	-4.32	2,687.09	102.57	3.97
Singapore	-	-	-	-	-	-	-
Thailand	1,135.05	1,137.90	2.85	0.25	1,159.56	21.66	1.90
Vietnam	1,086.80	1,121.80	35.00	3.22	1,130.00	8.20	0.73

Table 16 Maize harvested area in ASEAN countries, 2009-2011

Unit: 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	(%)		Quantities	(%)
ASEAN	**9,778.99**	**9,608.37**	**-170.62**	**-1.74**	**10,201.14**	**592.77**	**6.17**
Brunei	-	-	-	-	-	-	-
Cambodia	212.96	184.86	-28.10	-13.19	209.00	24.14	13.06
Indonesia	4,160.66	4,133.79	-26.88	-0.65	4,430.32	296.54	7.17
Lao PDR	175.97	168.83	-7.14	-4.06	205.00	36.17	21.42
Malaysia	-	-	-	-	-	-	-
Myanmar	354.74	362.81	8.07	2.27	384.72	21.91	6.04
Philippines	2,683.89	2,503.47	-180.42	-6.72	2,687.09	183.62	7.33
Singapore	-	-	-	-	-	-	-
Thailand	1,103.96	1,132.81	28.85	2.61	1,155.01	22.19	1.96
Vietnam	1,086.80	1,121.80	35.00	3.22	1,130.00	8.20	0.73

Table 17 Maize yield in ASEAN countries, 2009-2011

Unit : Tons/Hectare

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**3.75**	**3.75**	**0.00**	**0.00**	**3.85**	**0.10**	**2.67**
Brunei	-	-	-	-	-	-	-
Cambodia	4.34	3.94	-0.40	-9.22	4.15	0.21	5.33
Indonesia	4.24	4.32	0.08	1.89	4.42	0.10	2.31
Lao PDR	4.82	5.55	0.73	15.15	4.90	-0.65	-11.71
Malaysia	-	-	-	-	-	-	-
Myanmar	3.34	3.38	0.04	1.20	3.45	0.07	2.07
Philippines	2.62	2.54	-0.08	-3.05	2.58	0.04	1.57
Singapore	-	-	-	-	-	-	-
Thailand	4.18	3.93	-0.25	-5.98	4.09	0.16	4.07
Vietnam	4.08	4.04	-0.04	-0.98	4.25	0.21	5.20

Table 18 Maize damaged area in ASEAN by cause of damage, 2010

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Others	Total
ASEAN	**13,977**	**120,526**	**112**	**0**	**0**	**134,615**
Brunei	-	-	-	-	-	-
Cambodia	-	23,617	-	-	-	23,617
Indonesia	10,058	14,692	112	-	-	24,862
Lao PDR	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-
Philippines	130	80,918	-	-	-	81,048
Singapore	-	-	-	-	-	-
Thailand	3,789	1,299	-	-	-	5,088
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Note: n.a. = not available

Table 19 Maize balance sheet of ASEAN countries, 2010

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**3,527,701**	**36,064,975**	**4,686,680**	**44,279,356**	**38,972,776**	**1,043,421**	**4,263,159**	**44,279,356**
Brunei	n.a.	-	586.42	586.42	586.42	0.00	n.a.	586.42
Cambodia	27,919	728,975	0	756,894	153,085	561,311	42,498	756,894
Indonesia	1,553,249	17,844,676	283,272	19,681,197	18,123,987	75,283	1,481,927	19,681,197
Lao PDR	n.a.	936,700	n.a.	936,700	936,700	n.a.	n.a.	936,700
Malaysia	308,000	-	2,771,046	3,079,046	2,759,029	3,017	317,000	3,079,046
Myanmar	324,693	1,225,885	-	1,550,578	765,553	10,400	774,625	1,550,578
Philippines	254,400	6,350,555	71,260	6,676,215	6,476,195	20	200,000	6,676,215
Singapore	-	-	13,769	13,769	13,698	71	0	13,769
Thailand	846,105	4,451,284	366,747	5,664,136	4,280,000	393,319	990,817	5,664,136
Vietnam	213,335	4,526,900	1,180,000	5,920,235	5,463,943	0	456,292	5,920,235

Table 20 Maize balance sheet of ASEAN countries, 2011

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**4,263,159**	**39,253,848**	**4,370,826**	**47,887,833**	**40,118,871**	**1,342,228**	**6,426,734**	**47,887,833**
Brunei	n.a.	-	604.01	604.01	604.10	0.00	0.00	604.10
Cambodia	42,498	867,000	0	909,498	179,760	659,120	70,618	909,498
Indonesia[1/]	1,481,927	19,583,709	200,000	21,265,636	18,200,000	80,000	2,985,636	21,265,636
Lao PDR	n.a.	1,004,500	n.a	1,004,500	1,004,500	-	n.a.	1,004,500
Malaysia	317,000	-	2,853,222	3,170,222	2,840,921	3,108	326,193	3,170,222
Myanmar	774,625	1,328,964	-	2,103,589	829,793	100,000	1,173,796	2,103,589
Philippines	200,000	6,935,372	-	7,135,372	6,963,093	-	172,279	7,135,372
Singapore	0	-	17,000	17,000	17,000	0	0	17,000
Thailand	990,817	4,729,303	300,000	6,020,120	4,360,000	500,000	1,160,120	6,020,120
Vietnam	456,292	4,805,000	1,000,000	6,261,292	5,723,200	0	538,092	6,261,292

Note: 1/ The value is estimated by AFSIS Project n.a. = not available, nil = very small amount

Table 21 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

Unit : Ton

Country	2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**36,064,975**	**38,972,776**	**92.54**	**39,253,848**	**40,118,871**	**97.84**
Brunei	-	586	0.00	-	604	0.00
Cambodia	728,975	153,085	476.19	867,000	179,760	482.31
Indonesia	17,844,676	18,123,987	98.46	19,583,709	18,200,000	107.60
Lao PDR	936,700	936,700	100.00	1,004,500	1,004,500	100.00
Malaysia	-	2,759,029	0.00	-	2,840,921	0.00
Myanmar	1,225,885	765,553	160.13	1,328,964	829,793	160.16
Philippines	6,350,555	6,476,195	98.06	6,935,372	6,963,093	99.60
Singapore	-	13,698	0.00	-	17,000	0.00
Thailand	4,451,284	4,280,000	104.00	4,729,303	4,360,000	108.47
Vietnam	4,526,900	5,463,943	82.85	4,805,000	5,723,200	83.96

Table 22 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio)

Unit : Ton

Country	2010			2011		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**3,527,701**	**38,972,776**	**9.05**	**4,263,159**	**40,118,871**	**10.63**
Brunei	n.a.	586	-	n.a.	604	-
Cambodia	27,919	153,085	18.24	42,498	179,760	23.64
Indonesia	1,553,249	18,123,987	8.57	1,481,927	18,200,000	8.14
Lao PDR	n.a.	936,700	-	n.a.	1,004,500	-
Malaysia	308,000	2,759,029	11.16	317,000	2,840,921	11.16
Myanmar	324,693	765,553	42.41	774,625	829,793	93.35
Philippines	254,400	6,476,195	3.93	200,000	6,963,093	2.87
Singapore	-	13,698	0.00	0	17,000	0.00
Thailand	846,105	4,280,000	19.77	990,817	4,360,000	22.73
Vietnam	213,335	5,463,943	3.90	456,292	5,723,200	7.97

Note: n.a. = not available

Table 23 FOB Price of maize (Feed grain) in selected ASEAN countries

Unit : US$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	2008	215	220	231	218	216	215	230	223	225	230	235	240	225
	2009	220	230	240	220	230	225	240	230	245	230	221	231	230
	2010	215	235	225	225	250	245	240	255	260	245	230	225	238
Myanmar	2008	204	208	209	214	224	223	230	245	262	254	194	191	222
	2009	194	197	239	198	176	194	212	182	210	206	280	235	210
	2010	213	193	181	187	208	196		352					219
Thailand	2008	257	274	300	307	295	297	337	318	270	241	231	205	278
	2009	217	213	221	221	215	226	191	190	189	195	222	242	212
	2010	252	261	283	282	295	307	298	296	313	317			290

Table 24 CIF Price of maize (Feed grain) in selected ASEAN countries

Unit : US$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Malaysia	2009	212	194	194	199	213	227	227	250	217	215	240	227	218
	2010	238	241	244	250	246	240	246	250					244
Philippines In-quota	2009	-	408	212	242	-	392	243	-	-	-	-	-	299
	2010	-	-	-	-	-	502	362	n.a.	n.a.	n.a.	n.a.		432
Out-quota	2009	-	206	300	165	256	265	525	297	395	248	-	-	295
	2010	244	225	300	384	-	288	274	n.a.	n.a.	n.a.	-	-	286
Singapore	2009	215	245	203	249	221	237	235	245	96	218	219	232	218
	2010	246	251	247	242	260	262	282	316	276	302			268

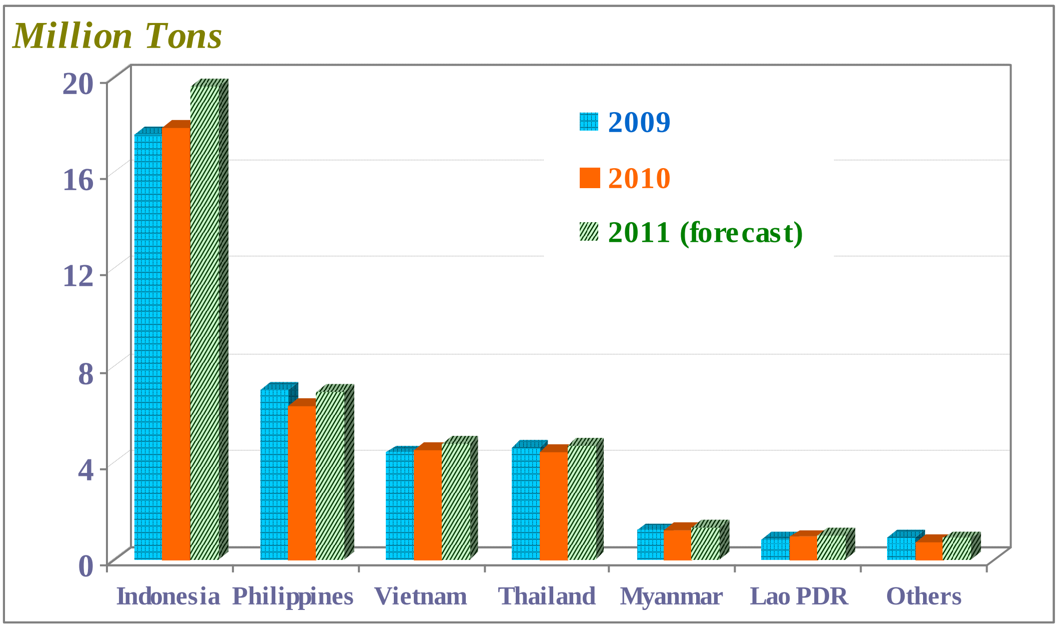


Figure 16 Maize production of selected countries in ASEAN, 2009-2011

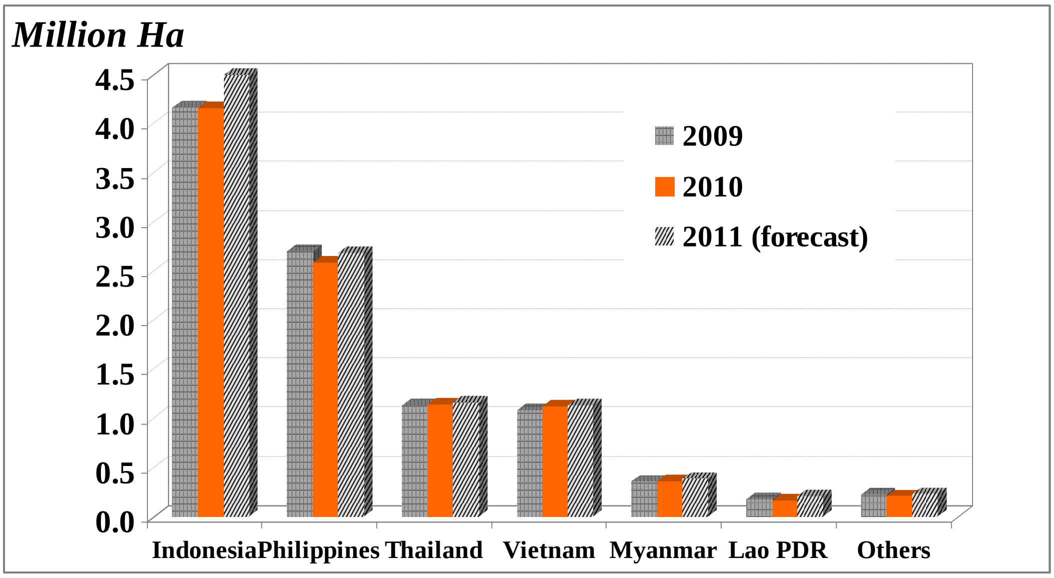


Figure 17 Maize planted area of selected countries in ASEAN, 2009-2011

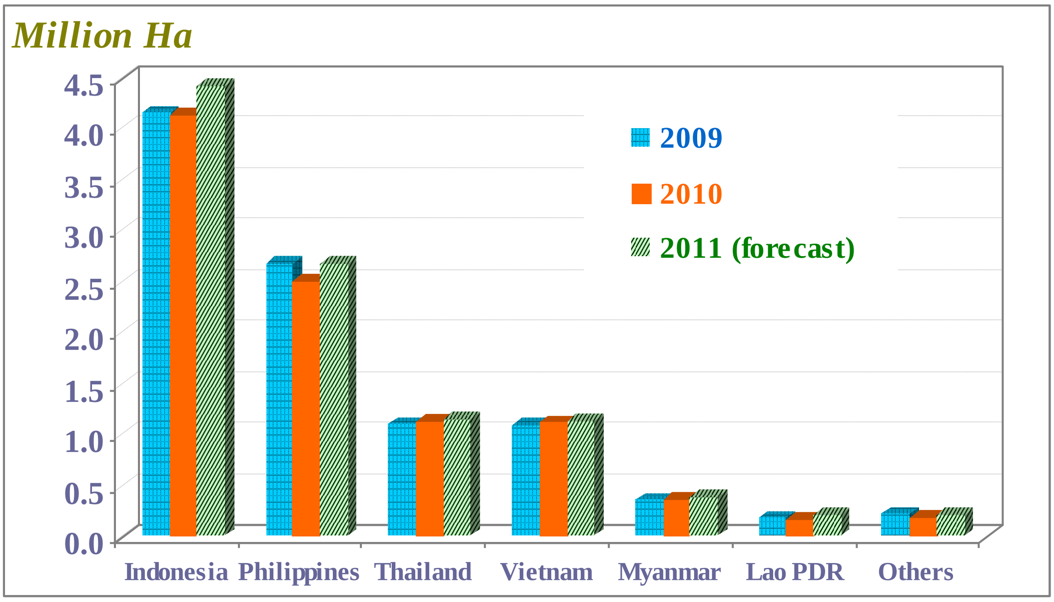


Figure 18 Maize harvested area of selected countries in ASEAN, 2009-2011

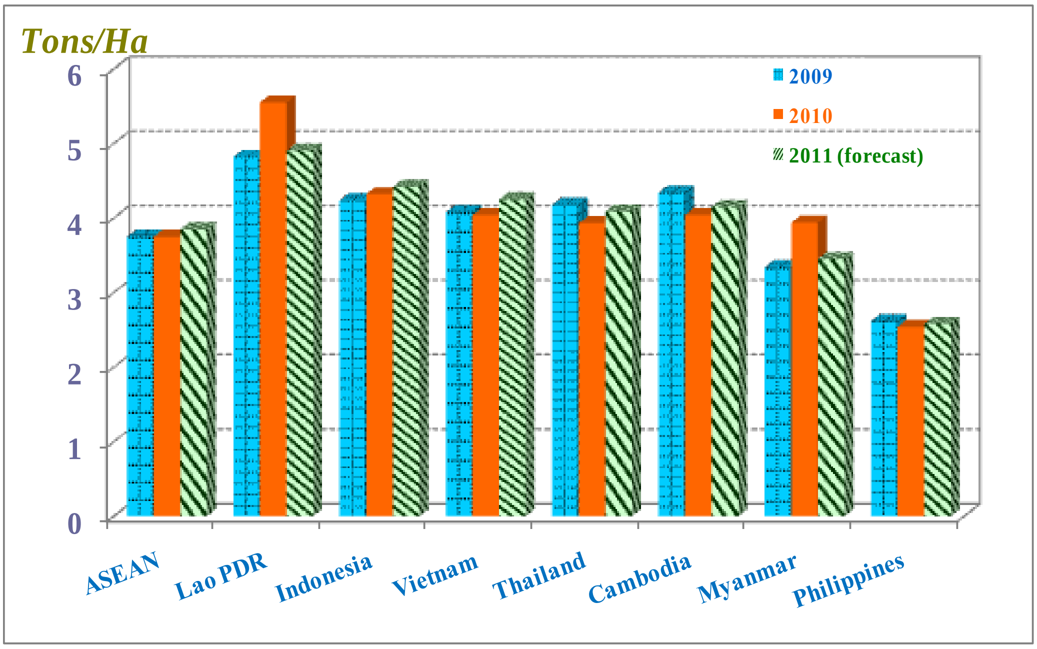


Figure 19 Maize yield of selected countries in ASEAN, 2009-2011

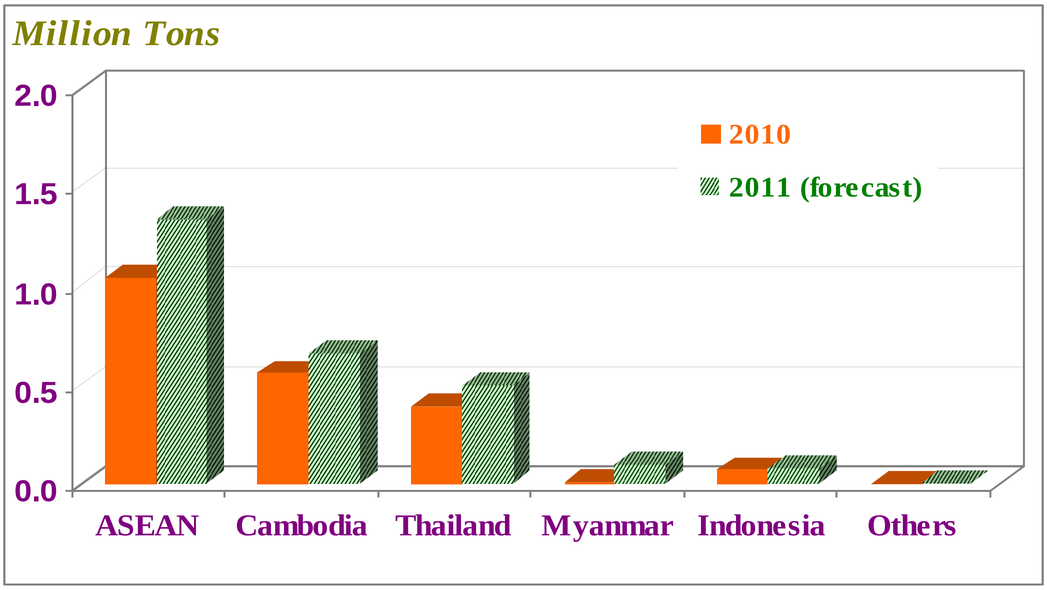


Figure 20 Amount of maize export (million tons) of selected countries in ASEAN in 2010-2011

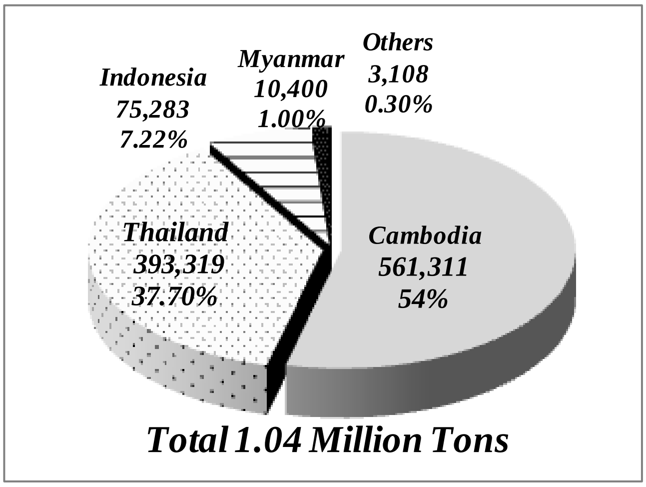


Figure 21 Share of maize export (tons) among ASEAN countries, 2010

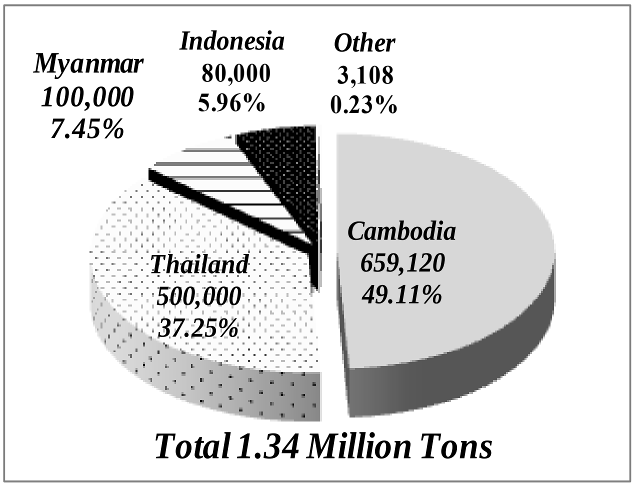


Figure 22 Share of maize export (tons) among ASEAN countries, 2011

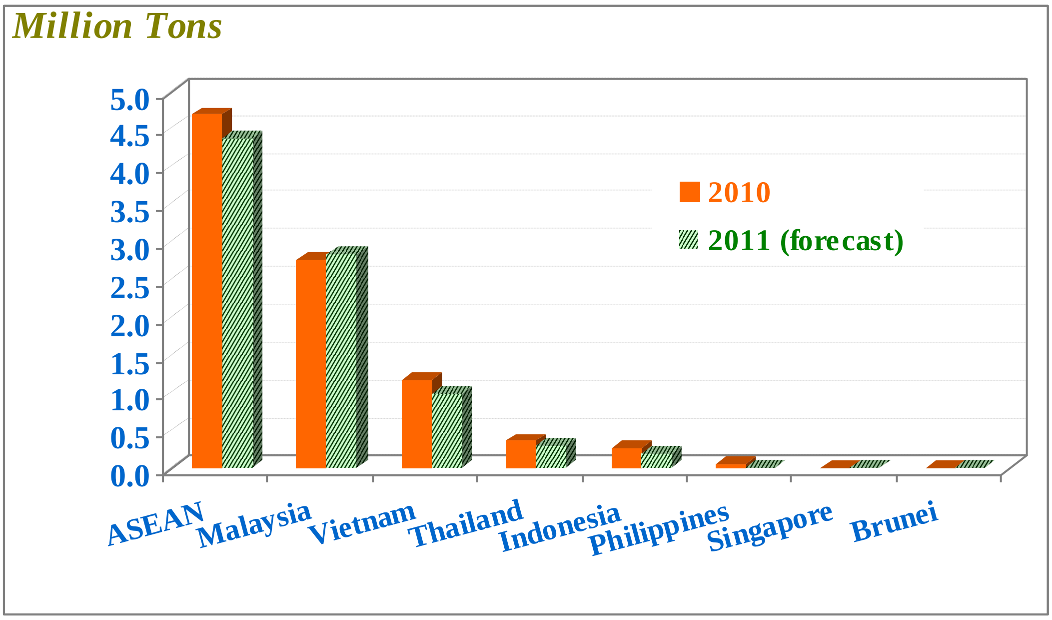
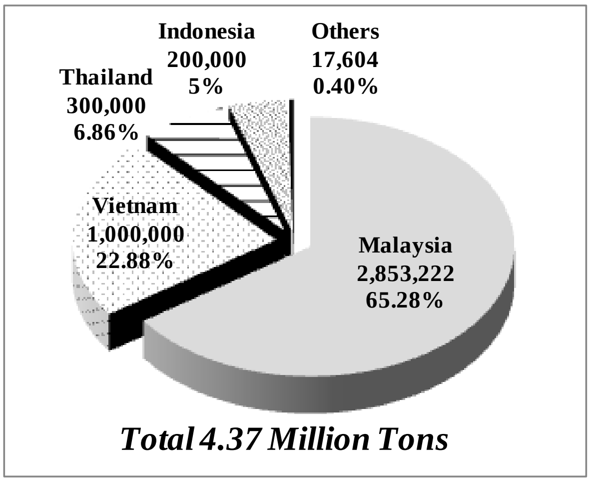


Figure 23 Amount of maize import (million tons) by selected countries in ASEAN in 2010-



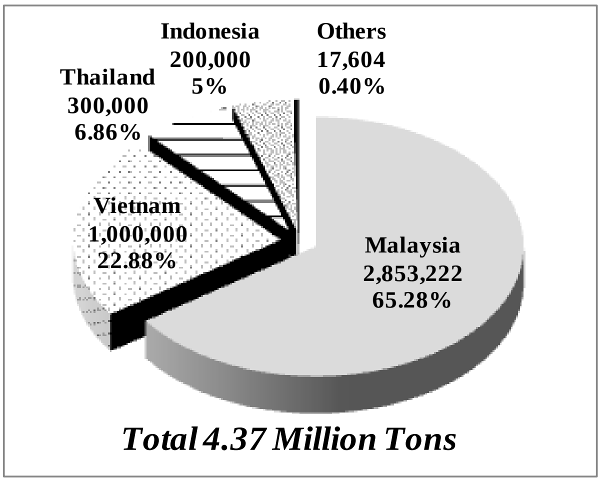


Figure 24 Share of maize import (tons) among ASEAN countries, 2010

Figure 25 Share of maize import (tons) among ASEAN countries, 2011

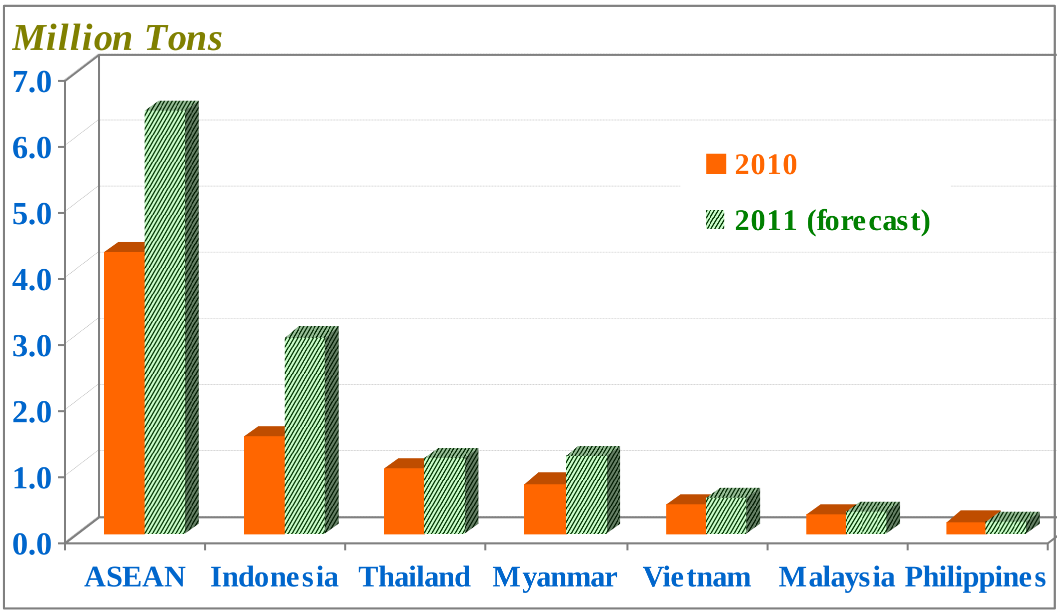


Figure 26 Amount of ending stock of maize in ASEAN countries

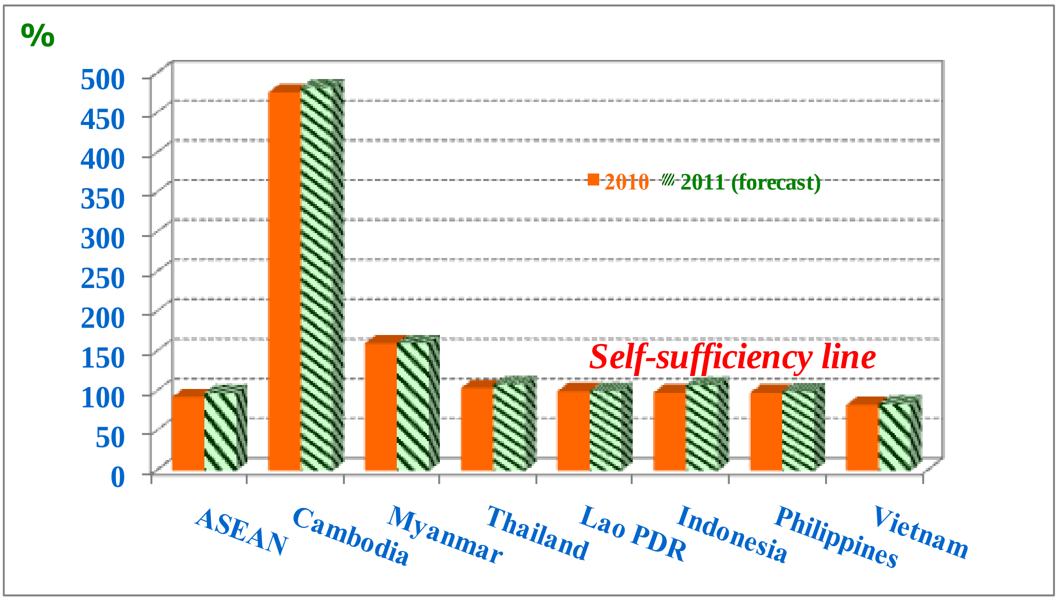


Figure 27 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

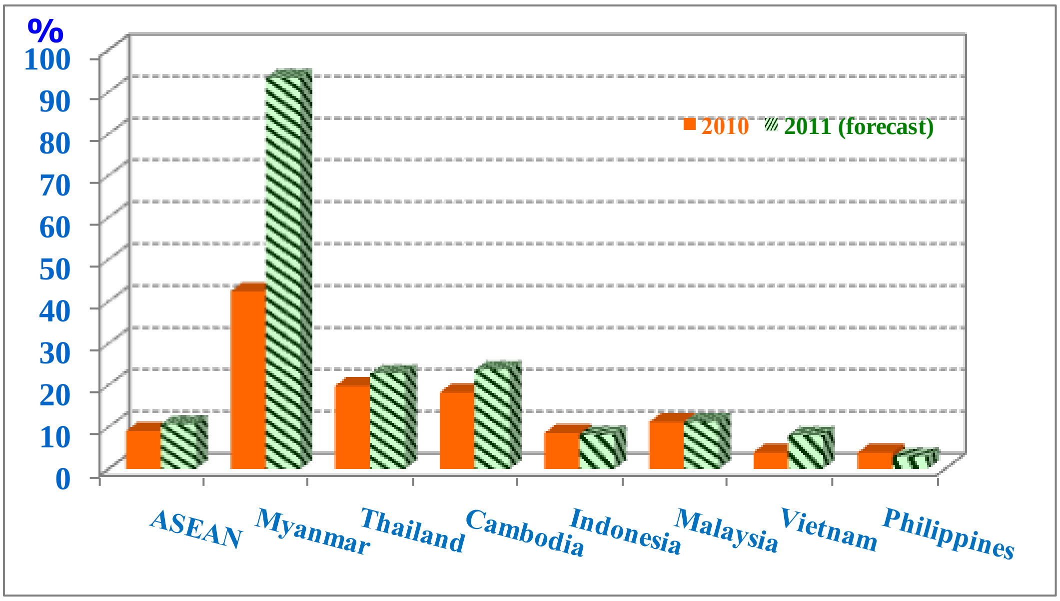


Figure 28 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio)

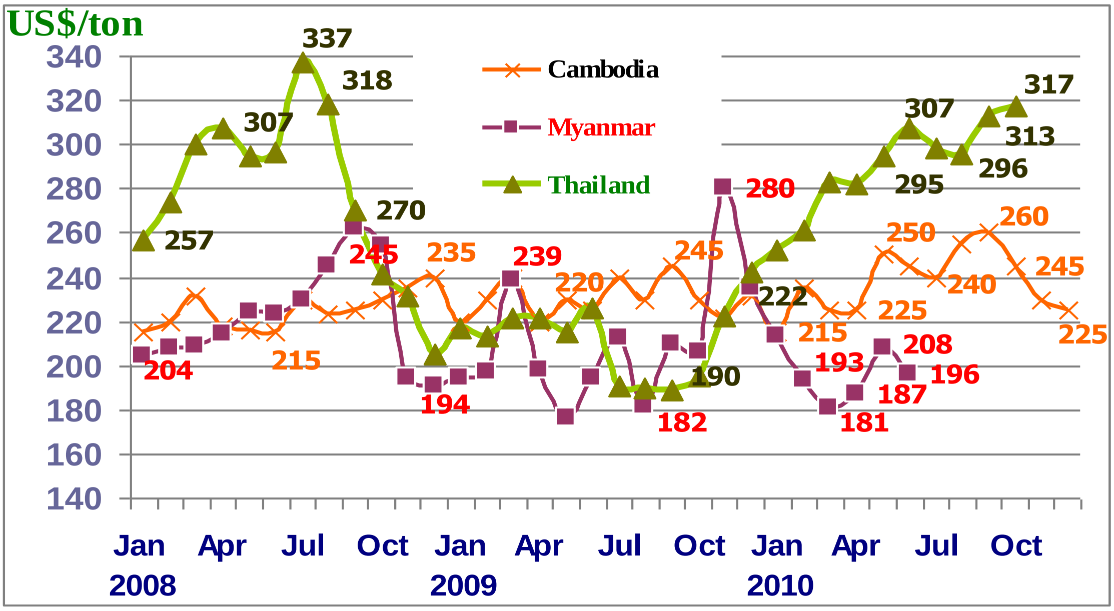


Figure 29 FOB price (US$) of maize of selected countries in ASEAN in 2008-2010

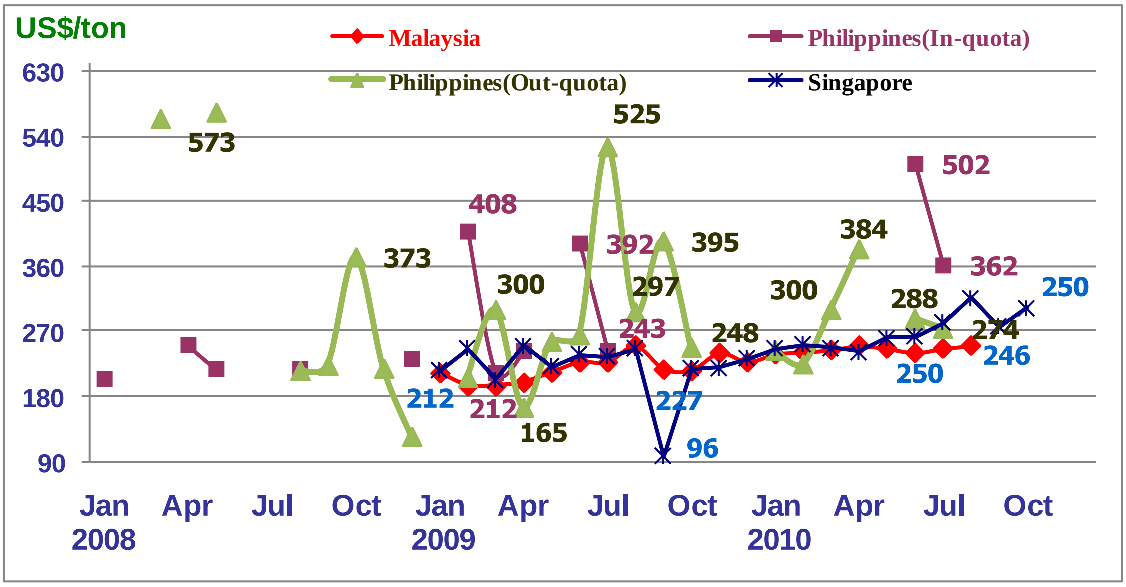


Figure 30 CIF price (US$) of maize of selected countries in ASEAN in 2008-2010

Highlights of Sugar Outlook

- ASEAN sugar supply in 2011 is forecast to be 22.39 million tons, up from 21.28 million tons in 2010 which is about 5.22 percent due to the increase in production and beginning stock as well as import.
- The sugar production is forecast to increase by 3.07 percent from 13.99 million tons in 2010 to 14.42 million tons in 2011.
- The beginning stock of sugar in 2011 is forecast to be 3.99 million tons, compared to 3.41 million tons in 2010, an increase of 0.58 million tons or 17.01 percent.
- The import is expected to be about 3.97 million tons, compared to 3.88 million tons in 2010, an increase of 0.09 million tons or 2.32 percent.
- For export, it is forecast to be 4.96 million tons, compared to 5.18 million tons in 2010, a decrease of 0.22 million tons or 4.25 percent.
- The ratio of production to domestic utilization (self-sufficiency ratio) for 2011 is forecast to be 115.49 percent, down a little from 115.81 percent in 2010. This ratio is still above 100 percent indicating that ASEAN as a whole can produce sugar more than regional utilization.
- The ratio of beginning stock to domestic utilization (food-security ratio) in 2011 is forecast to be 31.95 percent as compared to 28.27 percent in 2010.

Table 25 : Summary of the ASEAN sugar situation, 2010-2011

Items	**2010**	**2011**	**Change**	
			Quantity	%
Supply (Million tons)	21.28	22.39	1.11	5.22
Beginning stock	3.41	3.99	0.58	17.01
Production	13.99	14.42	0.43	3.07
Import	3.88	3.97	0.09	2.32
Demand (Million tons)	21.28	22.39	1.11	5.22
Domestic utilization	12.08	12.49	0.41	3.39
Export	5.18	4.96	-0.22	-4.25
Ending stock	3.99	4.91	0.92	23.06
Ratio of production to domestic utilization (%)	115.81	115.49	-0.32	-0.28
Ratio of beginning stock to domestic utilization (%)	28.27	31.95	3.68	13.02

ASEAN Sugar Situation in 2010

Production

The sugarcane production in ASEAN in 2010 (crop year 2009/10) was estimated at 132.10 million tons, which was 1.74 percent or 2.34 million tons lower than 134.4 million tons recorded last year. The decrease in production was mainly due to the reduction in yield. While the planted area has increased, the harvested area has decreased due to the damage caused mostly by the drought. Thailand is ranked first in ASEAN in terms of sugarcane production. Indonesia, the Philippines and Vietnam are the other major growing countries in the region. The Philippines, Myanmar and Cambodia have a reduction in sugarcane production. For other countries, the sugarcane production has increased (Table 26-30, Figure 31-34).

The average yield of sugarcane in ASEAN in 2010 was estimated at 58.62 tons per hectare in 2010, down from 59.60 tons per hectare in 2009. The decrease in yield has occurred in Cambodia, Indonesia, the Philippines and Thailand.

In **Cambodia**, the decrease in production was due solely to the decrease in the yield. The decrease in the yield was due to the drought while the increase in the area was due to the high price received by farmers.

In **Indonesia**, the increase in production due to the increase in area planted. The increase in area planted as resulted of the increasing of price, government policy and the favorable weather. Since the decrease of yield as resulted the decline of rendement due to the wet dry season.

In **Lao PDR**, the increase in production was due to the increase in both area and yield. The increases in area and yield were due to active participation of the private investors and the favorable weather.

For **Myanmar**, the production has decreased due to the decrease in planted area as a result of the higher price of the competing crops. The increase in yield was due to the favorable weather.

In the **Philippines**, the reduction in sugarcane production has resulted from the reduction of the both area and yield. The contraction of the area and the reduction in yield were due to the higher cost of fertilizer.

In **Thailand**, the increase in production was due to the expansion of the area as a result of the rise in price of sugarcane. However, the average yield has decreased a little due to the drought.

For **Vietnam**, the increase in production attributed to the increase in the area and yield as a result of price response of the farmers.

Utilization and Stock

The domestic utilization of sugar in ASEAN in 2010 (calendar year) was estimated at 12.08 million tons. The beginning stock of sugar in 2010 was estimated at 3.41 million tons and the ending stock was estimated at 3.99 million tons (Table 31). The ratio of production to domestic utilization (self sufficiency ratio) for 2010 was 115.81 percent (Table 33, Figure 42). This implied that ASEAN as a whole produced 15.81 percent more than utilization within the region. On the country by country basis, for producing countries, Vietnam and Indonesia did not produce enough for their own consumption. For Brunei, Malaysia and Singapore all the domestic consumption relied on imports.

The estimated ending stock of sugar in ASEAN in 2010 was 3.99 million tons. Thailand, the Philippines and Indonesia carried the most stock. These three countries together have stock about 87 percent of the total stock in ASEAN (Table 31, Figure 41).

Trade

In 2010, ASEAN as a whole exported about 5.18 million tons of sugar. Thailand alone exported about 4.66 million tons which was about 90 percent of the total export from ASEAN (Table 31, Figure 35-36).

For the import, ASEAN imported about 3.88 million tons of sugar in 2010. Malaysia and Indonesia are two major importing countries in the region. These two countries imported about 80 percent of the total ASEAN import (Table 31, Figure 38-39).The average FOB and CIF Price in every countries in 2010 were higher than 2009.

Price

The FOB and CIF prices of raw sugar and white sugar in selected countries in ASEAN is shown in Table 35 and 36.

Damaged area

The damage area of sugarcane was reported about 18,479 hectares comprising 16,045 hectares in Thailand caused by the drought and pests and 2,434 hectares in Myanmar which was damaged by wild animals particularly in the lower part of the country (Table 30).

Prospects for Sugar in 2011

Production

Sugarcane production of ASEAN in 2011 is forecast to be 135.90 million tons, up 3.81 million tons which is 2.88 percent from 132.10 million tons in 2010. Thailand, Vietnam and Myanmar are forecast to have less production as compared to previous year (Table 26, Figure 31).

For **Thailand** the reduction in production is predicted due to the decrease in yield because of the drought during the early season of planting. However, the area is forecast to increase due to the response in price of the farmers.

In **Indonesia**, the increase in production due to the increase in both area planted and yield. The increase in area planted as resulted of the increasing of price, government policy and the favorable weather.

In the **Philippines**, the increase in production attributed to the increase in both area and yield. The expansion of planted area is expected due to the favorable weather. The increase in yield is also expected due to the favorable weather and adequate water.

In **Vietnam**, the small reduction in production is expected due to the decrease in both area and yield due to the unfavorable weather.

Utilization and Stock

The domestic utilization of sugar in ASEAN in 2011 is forecast to be about 12.49 million tons, up 0.41 million tons which is 3.39 percent, compared to previous year (Table 32).

The beginning stock in ASEAN is forecast to increase from 3.4 million tons in 2010 to 3.99 million tons in 2011. The ending stock is forecast to increase from 3.99 million tons to 4.91 million tons during the same period (Table 32, Figure 41).

The ratio of production to domestic utilization (self–sufficiency ratio) in 2011 is forecast to be 115.49 percent which is about the same as in 2010 (Table 33, Figure 42). The ratio of stock to the domestic utilization (food security ratio) is forecast to increase from 28.27 percent to 31.95 percent. (Table 34, Figure 43).

Trade

Sugar export by ASEAN countries are forecast to decrease from 5.18 million tons in 2010 to 4.96 million tons in 2011. Thailand the major exporting country is also predicted to export less than previous year (Table 32, Figure 35 and 37).

For import, The AESAN countries, collectively, is predicted to import more of sugar, from 3.88 million tons in 2010 to 3.97 million tons in 2011(Table 32, Figure 38 and 40).

Table 26 Sugarcane production in ASEAN countries, 2009-2011

Unit: 1,000 Tons

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**134,433.9**	**132,095.18**	**2,338.76**	**-1.74**	**135,904.57**	**3,809.39**	**2.88**
Brunei	-	-	-	-	-	-	-
Cambodia	350.16	310.86	-39.29	-11.22	329.00	18.14	5.83
Indonesia[1/]	18,523.50	18,597.17	73.67	0.40	19,630.00	1,032.83	5.55
Lao PDR	819.74	1,063.24	243.50	29.71	1,200.00	136.76	12.86
Malaysia	-	-	-	-	-	-	-
Myanmar	9,744.22	9,561.98	-182.24	-1.87	9,228.59	-333.39	-3.49
Philippines	22,932.82	18,145.82	-4,787.00	-20.87	17,009.78	3,163.36	17.43
Singapore	-	-	-	-	-	-	-
Thailand	66,816.45	68,807.80	1,991.35	2.98	68,687.90	-119.90	-0.17
Vietnam	15,247.06	15,608.30	361.24	2.37	15,519.90	-88.40	-0.57

Table 27 Sugarcane planted area in ASEAN countries, 2009-2011

Unit: 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**2,298.85**	**2,304.15**	**5.30**	**0.23**	**2,349.40**	**45.25**	**1.96**
Brunei	-	-	-	-	-	-	-
Cambodia	13.53	15.55	2.03	14.97	16.40	0.85	5.44
Indonesia[1/]	473.84	478.21	4.37	0.92	480.00	1.79	0.38
Lao PDR	18.43	22.35	3.92	21.26	30.00	7.65	34.22
Malaysia	-	-	-	-	-	-	-
Myanmar	165.27	160.12	-5.15	-3.12	151.51	-8.61	-5.38
Philippines	404.04	362.83	-51.20	-12.67	362.83	0.96	0.27
Singapore	-	-	-	-	-	-	-
Thailand	963.65	1,009.58	45.94	4.77	1,053.29	43.71	4.33
Vietnam	260.10	265.50	5.40	2.08	264.40	-1.10	-0.41

Table 28 Sugarcane harvested area in ASEAN countries, 2009-2011

Unit: 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	(%)		Quantities	(%)
ASEAN	**2,255.68**	**2,253.37**	**-2.30**	**-0.10**	**2,337.07**	**83.69**	**3.71**
Brunei	-	-	-	-	-	-	-
Cambodia	13.48	15.55	2.07	15.36	16.40	0.85	5.44
Indonesia[1/]	443.83	446.15	2.32	0.52	450.00	3.85	0.86
Lao PDR	18.43	22.35	3.92	21.26	30.00	7.65	34.22
Malaysia	-	-	-	-	-	-	-
Myanmar	161.78	157.69	-4.10	-2.53	151.51	-6.17	-3.92
Philippines	404.04	362.83	-51.44	-12.73	381.90	35.61	10.10
Singapore	-	-	-	-	-	-	-
Thailand	954.01	993.54	39.53	4.14	1,036.56	43.02	4.33
Vietnam	260.10	265.50	5.40	2.08	264.40	-1.10	-0.41

Note: 1/ data in 2011 estimated by AFSIS

Table 29 Sugarcane yield in ASEAN countries, 2009-2011

Unit: Ton/Hectare

Country	2009 (2008/09)	2010 (2009/10)	change *2009 over 2008*		2011 (2010/11)	change *2010 over 2009*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**50.29**	**50.00**	**-0.29**	**-0.58**	**48.22**	**-1.77**	**-3.55**
Brunei	-	-	-	-	-	-	-
Cambodia	25.97	19.99	-5.98	-23.04	20.06	0.07	**0.37**
1st crop	24.91	21.42	-3.49	-14.02	20.53	-0.90	**-4.18**
2nd crop	30.66	19.80	-10.86	-35.41	20.00	0.20	**1.01**
Indonesia	41.74	41.68	-0.05	-0.12	43.62	1.94	**4.65**
Lao PDR	44.47	47.57	3.10	6.96	40.00	-7.57	**-15.91**
Malaysia	-	-	-	-	-	-	-
Myanmar	60.23	60.64	0.41	0.68	60.91	0.27	**0.45**
Philippines	56.76	50.01	-6.75	-11.89	44.54	-5.47	**-10.94**
1st crop	53.71	45.67	-8.04	-14.96	40.72	-4.95	**-10.84**
2nd crop	62.64	59.04	-3.60	-5.75	52.48	-6.55	**-11.10**
Singapore	-	-	-	-	-	-	-
Thailand	70.04	69.26	-0.78	-1.12	66.27	-2.99	**-4.32**
Vietnam	58.56	58.79	0.23	0.39	58.70	-0.09	**-0.15**

Table 30 Sugarcane damaged area in ASEAN by cause of damage, 2010

Country	**Cause of Damage (Hectares)**						
	Flood	**Drought**	**Pests**	**Diseases**	**Others**	**Not specify**	**Total**
ASEAN	**-**	**10,445**	**5,600**	**-**	**2,434**	**-**	**18,479**
Brunei	-	-	-	-	-	-	-
Cambodia	-	-	-	-	-	-	-
Indonesia	-	-	-	-	-	-	-
Lao PDR.	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	2,434	-	2,434
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	10,445	5,600	-	-	-	16,045
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	-	n.a.

Table 31 Sugar balance sheet of ASEAN countries, 2010

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**3,413,667**	**13,987,019**	**3,876,843**	**21,277,530**	**12,077,152**	**5,179,561**	**3,989,730**	**21,277,529**
Brunei	5,647	-	5,768	11,415	5,593	0	5,822	11,415
Cambodia	n.a.	31,086	n.a.	31,086	n.a.	n.a.	n.a.	31,086
Indonesia	998,843	2,861,103	1,403,040	5,262,986	4,175,622	nil	1,087,364	5,262,986
Lao PDR	n.a.	106,324	n.a.	106,324	106,324	n.a.	n.a.	106,324
Malaysia	202,279	-	1,710,241	1,912,520	1,468,484	239,287	204,749	1,912,520
Myanmar	0	956,198	-	956,198	950,365	5,833	0	956,198
Philippines	811,306	1,802,903	195,201	2,809,410	1,493,281	129,331	1,186,798	2,809,410
Singapore	0	-	352,593	352,593	207,483	145,110	0	352,593
Thailand	1,206,392	6,928,713	nil	8,135,105	2,270,000	4,660,000	1,205,105	8,135,105
Vietnam	189,200	1,300,692	210,000	1,699,892	1,400,000	0	299,892	1,699,892

Table 32 Sugar balance sheet of ASEAN countries, 2011

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**3,989,730**	**14,423,158**	**3,973,940**	**22,386,828**	**12,488,898**	**4,959,073**	**4,905,957**	**22,386,828**
Brunei	5,822	-	5,941	11,763	5,763	-	6,000	11,763
Cambodia	n.a.	32,900	n.a.	32,900	n.a.	n.a.	n.a.	32,900
Indonesia[1/]	1,087,364	3,020,000	1,400,000	5,507,364	4,200,000	nil	1,307,364	5,507,364
Lao PDR	n.a.	120,000	n.a.	120,000	120,000	n.a.	n.a.	120,000
Malaysia	204,749	-	1,744,446	1,949,195	1,495,276	244,073	209,846	1,949,195
Myanmar	0	922,859	-	922,859	922,859	0	0	922,859
Philippines[1/]	1,186,798	2,117,203	200,000	3,504,001	1,500,000	130,000	1,874,001	3,504,001
Singapore	0	-	420,000	420,000	245,000	175,000	0	420,000
Thailand	1,205,105	6,916,871	3,553	8,125,529	2,500,000	4,410,000	1,215,529	8,125,529
Vietnam	299,892	1,293,325	200,000	1,793,217	1,500,000	0	293,217	1,793,217

Note: 1/estimated by AFSIS

Table 33 Ratio of sugar production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

Unit: Ton

Country	2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**13,987,019**	**12,077,152**	**115.81**	**14,423,158**	**12,488,898**	**115.49**
Brunei	-	5,593	0.00	-	5,763	0.00
Cambodia	31,086	n.a.	-	32,900	n.a.	-
Indonesia[1/]	2,861,103	4,175,622	68.52	3,020,000	4,200,000	71.90
Lao PDR	106,324	106,324	100.00	120,000	120,000	100.00
Malaysia	-	1,468,484	0.00	-	1,495,276	0.00
Myanmar	956,198	950,365	100.61	922,859	922,859	100.00
Philippines	1,802,903	1,493,281	120.73	2,117,203	1,500,000	141.15
Singapore[1/]	-	207,483	0.00	-	245,000	0.00
Thailand	6,928,713	2,270,000	305.23	6,916,871	2,500,000	276.67
Vietnam	1,300,692	1,400,000	92.91	1,293,325	1,500,000	86.22

Table 34 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (Food security ratio)

Unit: Ton

Country	2010			2011		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**3,413,667**	**12,077,152**	**28.27**	**3,989,730**	**12,488,898**	**31.95**
Brunei	5,647	5,593	100.97	5,822	5,763	101.02
Cambodia	n.a.	n.a.	-	n.a.	n.a.	-
Indonesia[1/]	998,843	4,175,622	23.92	1,087,364	4,200,000	25.89
Lao PDR	n.a.	106,324	-	n.a.	120,000	-
Malaysia	202,279	1,468,484	13.77	204,749	1,495,276	13.69
Myanmar	n.a.	950,365	-	n.a.	922,859	-
Philippines	811,306	1,493,281	54.33	1,186,798	1,500,000	79.12
Singapore[1/]	0	207,483	0.00	0	245,000	0.00
Thailand	1,206,392	2,270,000	53.15	1,205,105	2,500,000	48.20
Vietnam	189,200	1,400,000	13.51	299,892	1,500,000	19.99

Note: 1/Value is estimated by AFSIS

Table 35 FOB Price of sugar in selected ASEAN countries

Unit : US$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	White Sugar	2009	255	283	276	286	329	335	365	450	476				340
		2010													
Myanmar		2009	-	-	-	352	374	334	332	333	-	-	-	-	345
		2010	623	676											650
Thailand	Raw Sugar	2008	260	257	278	256	258	253	252	247	264	277	272	260	261
		2009	258	283	295	295	331	332	318	340	337	341	339	375	320
		2010	383	380	443	435	395	404	424	432	454	425			417
Thailand	White Sugar	2008	305	306	321	317	316	313	321	328	336	346	306	334	321
		2009	305	312	342	362	378	386	390	390	409	441	439	454	384
		2010	530	520	557	524	515	524	511	552	559	549			534

Table 36 CIF Price of sugar in selected ASEAN countries

Unit : US$/Ton

Country		Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Philippines	Raw Sugar	2009	278	293	295	301	354	362	406	495	508	499	491	519	400
		2010	584	560	411	363	335	350	385	407	493				432
Singapore	Raw Sugar	2009	379	395	444	407	453	410	446	468	531	500	515	587	461
		2010	571	644	725	559	657	557	551	574	663	615			612
Malaysia	Raw Sugar	2009	349	387	341	307	387	341	401	369	385	429	424	507	386
		2010	435	551	652	492	513	462	464	426					499

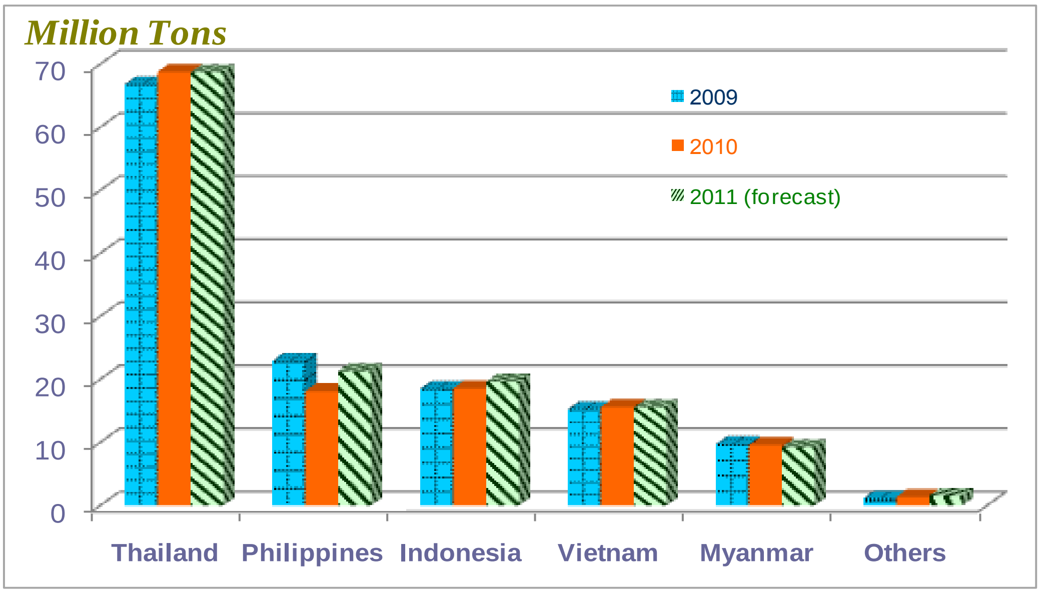


Figure 31 Sugarcane production of selected countries in ASEAN, 2009-2011

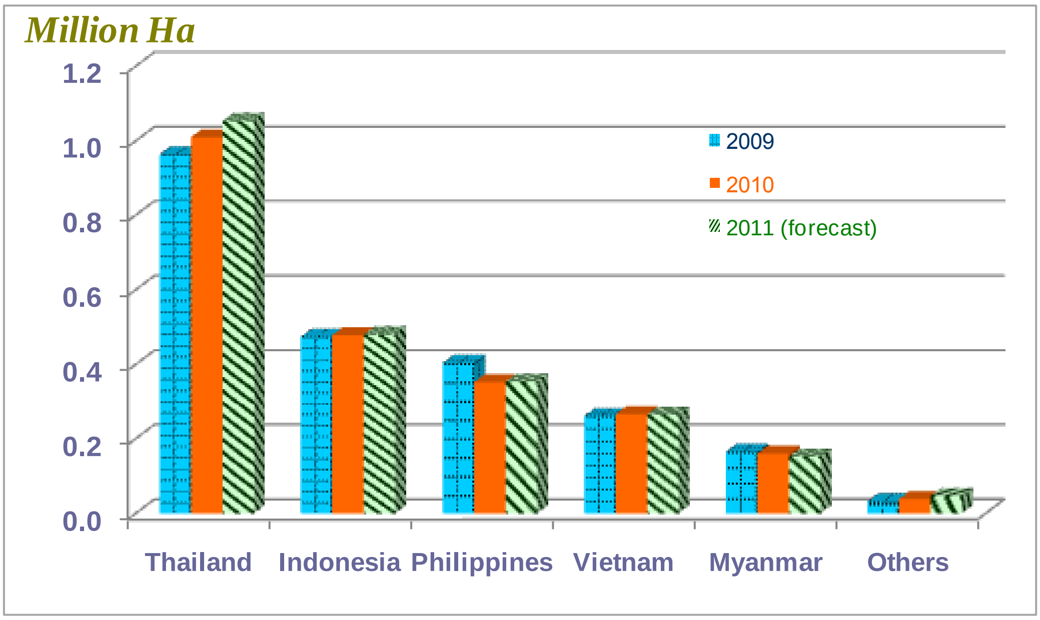


Figure 32 Sugarcane planted area of selected countries in ASEAN, 2010-2011

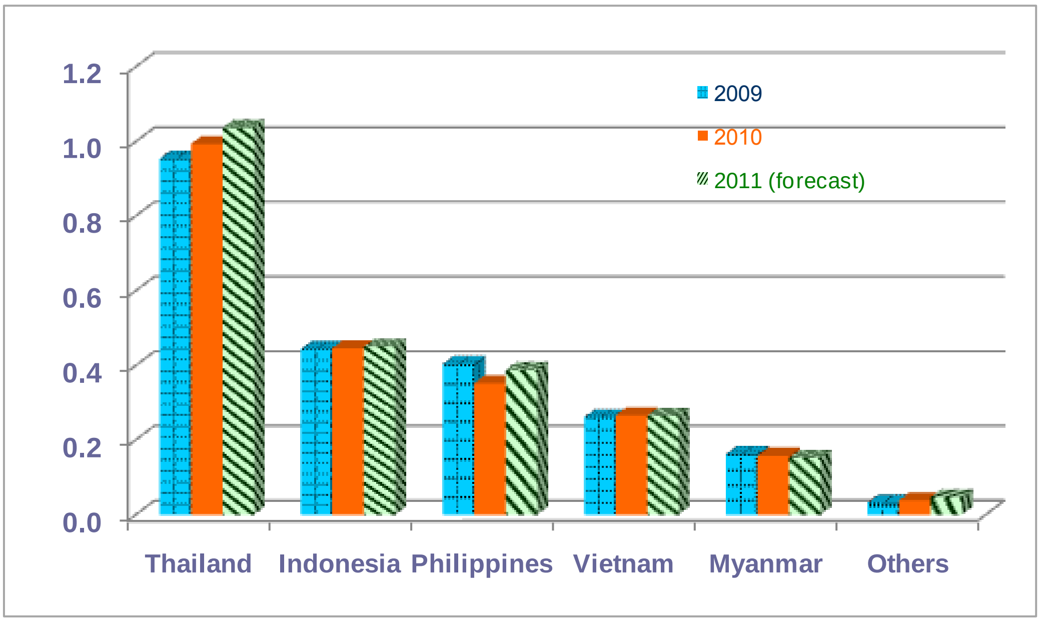


Figure 33 Sugarcane harvested area of selected countries in ASEAN, 2009-2011

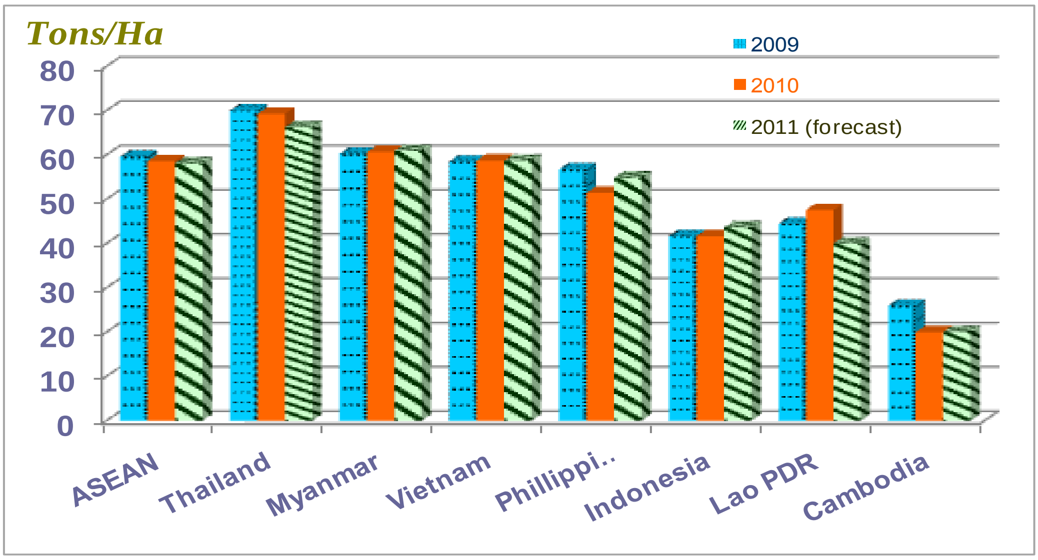


Figure 34 Sugarcane yield of selected countries in ASEAN, 2009-2011

Figure 35 Amount of Sugar export (million tons) of selected countries in ASEAN in 2010-2011

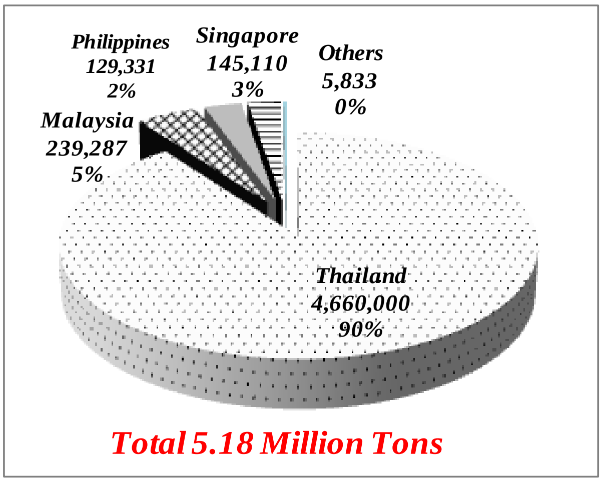


Figure 36 Share of sugar export (tons) among ASEAN countries, 2010

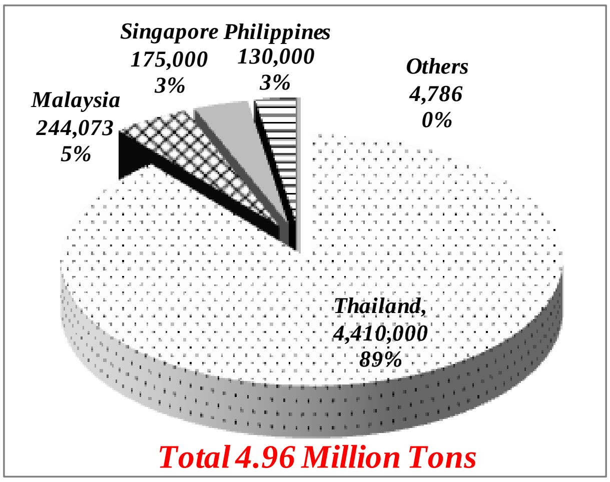


Figure 37 Share of sugar export (tons) among ASEAN countries, 2011

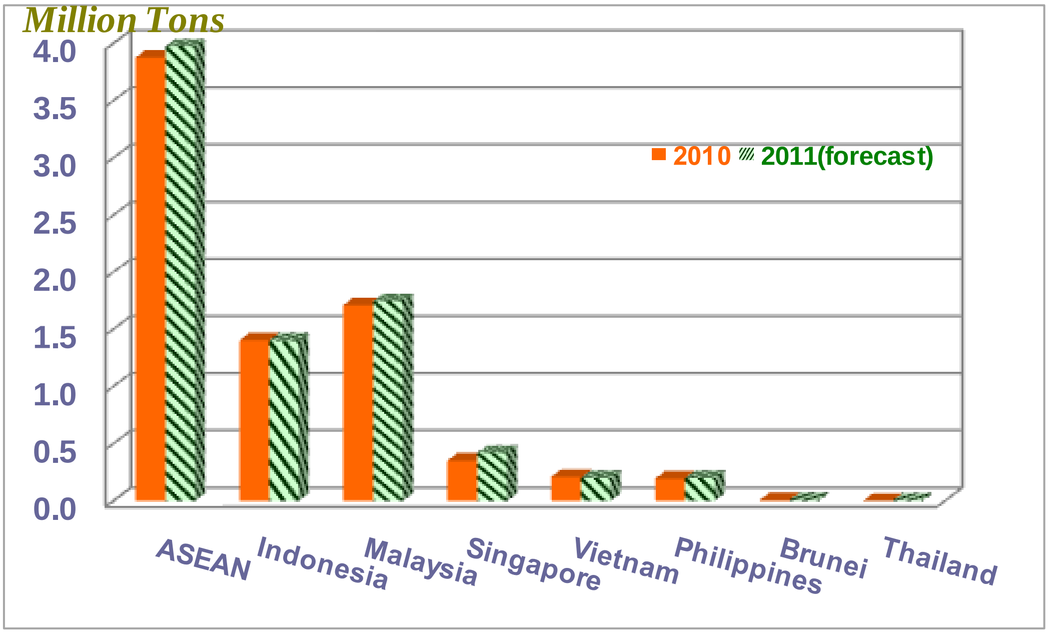


Figure 38 **Amount of sugar import (million tons) by selected countries in ASEAN in 2010-2011**

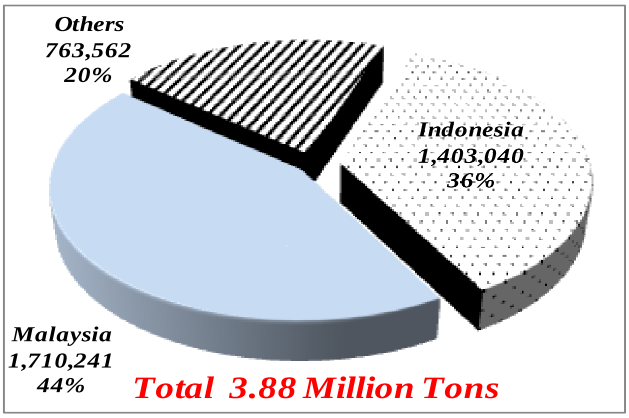


Figure 39 **Share of sugar import (tons) among ASEAN countries, 2010**

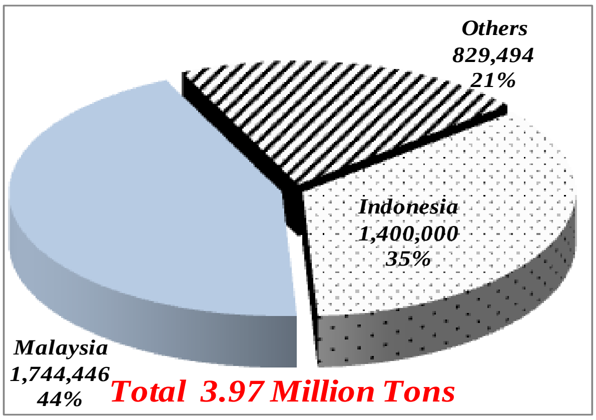


Figure 40 **Share of sugar import (tons) among ASEAN countries, 2011**

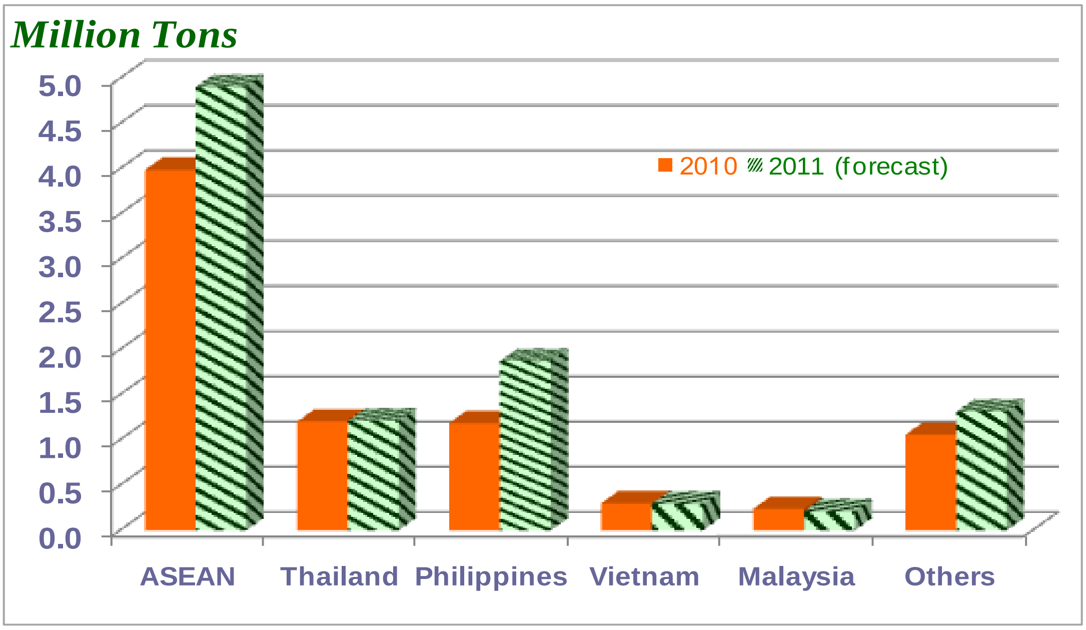


Figure 41 : Amount of ending stock of sugar in ASEAN countries

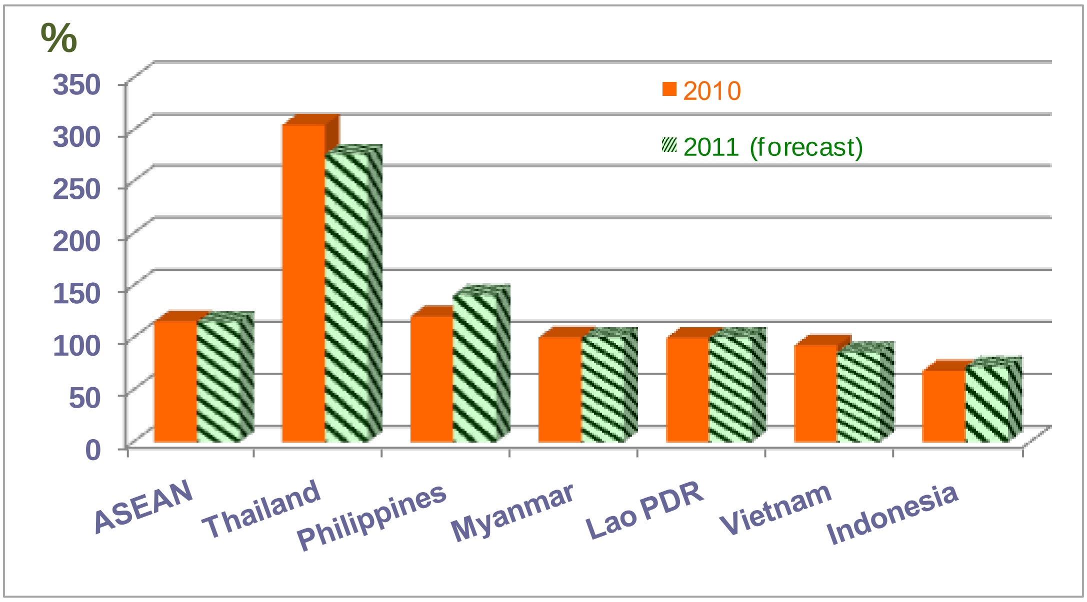


Figure 42 Ratio of sugar production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

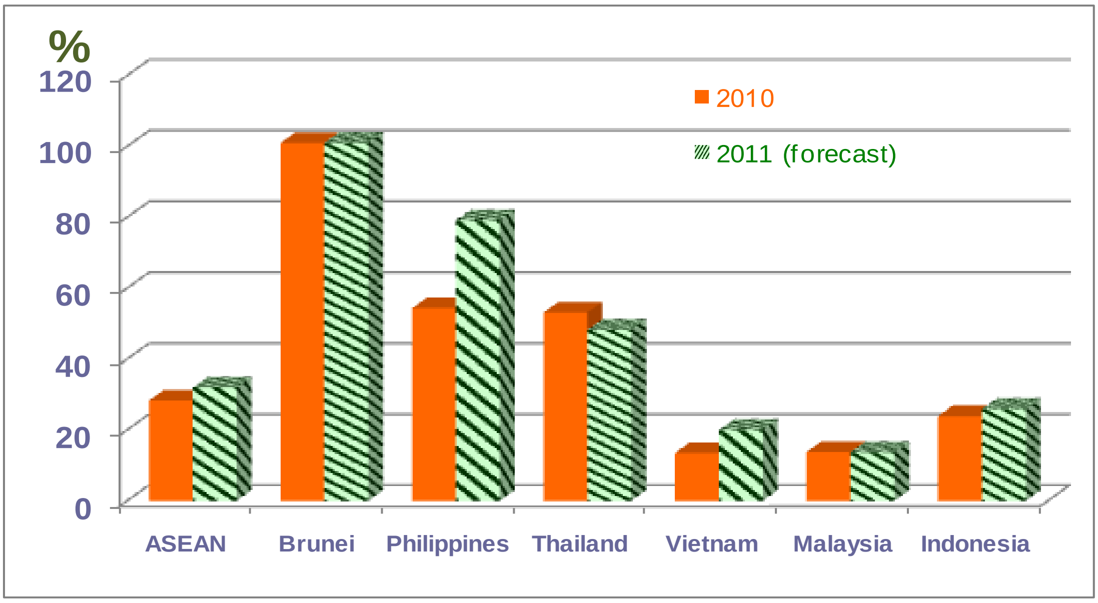


Figure 43 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (Food security ratio)

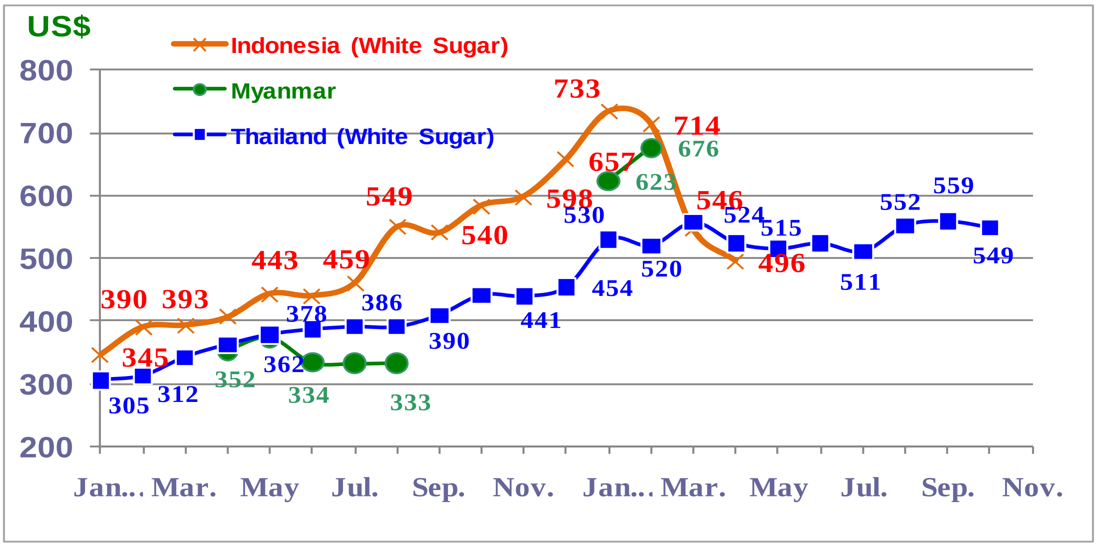


Figure 44 FOB price (US$) of white sugar of selected countries in ASEAN in 2009-2010

Highlights of Soybean Outlook

- Soybean supply in ASEAN is forecast to increase from 8.18 million tons in 2010 to 8.94 million tons in 2011, an increase of about 9.29 percent.
- The increase in supply is attributed to the increase in production and import.
- The production is forecast to increase from 1.83 million tons in 2010 to 2.02 million tons in 2011 which is equal to 10.38 percent increase.
- The beginning stock of 2011 is forecast at 0.11 million tons, down from 0.12 million tons in 2010, which is about 8.33 percent decrease.
- The ending stock of 2011 is forecast to decrease about 9.09 percent from 0.11 million tons to 0.10 million tons.
- The ratio of production to domestic utilization (self-sufficiency ratio) is expected to increase from 22.89 percent in 2010 to 23.37 percent in 2011 which indicates that the total production in ASEAN as a whole is not enough for regional utilization.
- The ratio of beginning stock to utilization (food security ratio) is expected to decrease from 1.48 percent to 1.22 percent.

Table 37 : Summary of the ASEAN soybean situation, 2010-2011

Items	2010	2011	Change	
			Quantity	%
Supply (Million tons)	8.18	8.94	0.76	9.29
Beginning stock	0.12	0.11	-0.01	-8.33
Production	1.83	2.02	0.19	10.38
Import	6.24	6.81	0.57	9.13
Demand (Million tons)	8.18	8.94	0.76	9.29
Domestic utilization	7.97	8.66	0.69	8.66
Export	0.16	0.18	0.02	12.50
Ending stock	0.11	0.10	-0.01	-9.09
Ratio of production to domestic utilization (%)	22.89	23.37	0.48	2.10
Ratio of beginning stock to domestic utilization (%)	1.48	1.22	-0.26	-17.57

ASEAN Soybean Situation in 2010

Production

The estimate of soybean production in ASEAN in 2010 (crop year 2009/10) was 1.83 million tons, an increase of 0.06 million tons or 3.12 percent from 1.77 million tons in 2009. The increase in production was due to the increase in both planted area and yield. Indonesia is ranked first in soybean production, followed by Vietnam, Myanmar, Thailand and Cambodia (Table 38-41, Figure 45-48).

In **Cambodia**, the price was the main factor affecting the increase in the planted area while the favorable weather was the contributing factor to the increase in yield.

In **Indonesia**, the production has decreased due to the decrease in the area while the yield relatively unchanged. The decrease in area was due to the increase in the prices of competing crops.

In **Lao PDR**, the expansion of area and the increase in yield was the two factors contributing to the increase in production. The increase in price received by farmers and favorable weather were inducing factors contributing to the increase in area and yield.

For **Myanmar**, both area and yield have increased. The favorable weather was the factor contributing to these increases.

For the **Philippines**, the decrease in production was due to the decrease in planted area as a result of unfavorable weather. The yield has increased due to the wider usage of improved varieties.

In **Thailand**, the decrease in production attributed to the decrease in planted area while the yield has increased. The decrease in planted area was due to the lower return from soybean cultivation as compared to other crops. The higher yield was obtained due to the favorable weather.

For **Vietnam**, the increase in production came from the increase in area and the yield. The increase in area was due to the increase in price of soybeans. The increase in yield was due to wider use of the improved varieties.

Utilization and Stock

The domestic utilization of soybeans in ASEAN in 2010 was estimated at 7.97 million tons (Table 43). The ratio of production to domestic utilization (self sufficiency ratio) for 2010 was 22.89 percent (Table 45, Figure 56) which meant that ASEAN region was not self sufficient in soybeans. However, Cambodia, Lao PDR and Myanmar produced enough for their own consumption.

The beginning stock of soybeans in 2010 was estimated at 0.12 million tons while the ending stock was estimated at 0.11 million tons (Table 43). Thailand and Cambodia have the most stock in the region. The ratio of the beginning stock to the domestic utilization (food security ratio) is estimated at 1.48 percent. Most countries have very low ratios, except Cambodia which has the ratio 14.28 percent (Table 46, Figure 57).

Trade

In 2010, ASEAN altogether exported about 0.16 million ton. Cambodia was the number one in terms of soybeans export (Table 43, Figure 49 and 50).

For the import, ASEAN as a whole imported about 6.24 million tons. The major importing countries in the region were Vietnam, Thailand and Indonesia (Table 43, Figure 52 and 53).

Price

The FOB and CIF prices of soybeans are shown in Table 47 and 48. The FOB and CIF Price in 2010 were lower than 2009.

Prospects for Soybeans in 2011

Production

Soybean production of ASEAN in 2011 is forecast to be 2.02 million tons, up 0.20 million tons which is about 10.92 percent from 1.83 million tons in 2010 (Table 38, Figure 45). The increase in production is expected for all producing countries in ASEAN. Indonesia, the biggest producing country in ASEAN, is also forecast to register the biggest increase. The increase in production in most countries is mainly due to the expected increase in both area and yield due to the price increase in the previous year and the anticipated favorable weather. Thailand is the only country that is expected to have a reduction in planted area due to the shortage and high price of soybeans seed (Table 38-41, Figure 45-48).

Utilization and Stock

The domestic utilization of soybeans in ASEAN is forecast to increase about 8.66 percent from 7.97 million tons to 8.66 million tons due to growing demand for feeds (Table 43 and 44).

The beginning stock in ASEAN is estimated to decrease by 0.01 million ton or 8.33 percent from 0.12 million ton in 2010 to 0.11 million ton in 2011. The ending stock is forecast to decrease about 9.09 percent from 0.11 million tons to 0.10 million tons in 2011 (Table 43 and 44, Figure 55).

The ratio of production to domestic utilization (self–sufficiency ratio) is forecast to be 23.37 percent (Table 45, Figure 56). The ratio of beginning stock to the domestic utilization (food security ratio) is forecast to be 1.22 percent (Table 46, Figure 57).

Trade

Although soybeans export from ASEAN is forecast to increase by 12.5 percent from 0.16 million ton to 0.18 million ton, this volume is considered small compared to the total regional demand (Table 43 and 44, Figure 49 and 51). The import is forecast to increase by about 9.13 percent from 6.24 million tons to 6.81 million tons (Table 43 and 44, Figure 52 and 54).

Table 38 Soybean production in ASEAN countries, 2009-2011

Unit: 1,000 Tons

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**1,769.98**	**1,825.23**	**55.25**	**3.12**	**2,024.55**	**199.33**	**10.92**
Brunei	-	-	-	-	-	-	-
Cambodia	137.28	167.79	30.52	22.23	191.67	23.88	14.23
Indonesia	974.51	905.02	-69.50	-7.13	1,065.33	160.32	17.71
Lao PDR	19.43	25.00	5.58	28.70	29.50	4.50	18.00
Malaysia	-	-	-	-	-	-	-
Myanmar	240.05	253.68	13.63	5.68	261.30	7.62	3.00
Philippines	0.84	0.83	-0.01	-1.43	0.84	0.00	1.08
Singapore	-	-	-	-	-	-	-
Thailand	184.27	176.61	-7.66	-4.16	176.76	0.15	0.09
Vietnam	213.60	296.30	82.70	38.72	299.15	2.85	0.96

Table 39 Soybean planted area in ASEAN countries, 2009-2011

Unit: 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**1,265.86**	**1,274.65**	**8.79**	**0.69**	**1,401.66**	**127.02**	**9.96**
Brunei	-	-	-	-	-	-	-
Cambodia	96.39	105.07	8.68	9.00	113.75	8.68	8.26
Indonesia	724.74	673.48	-51.26	-7.07	789.56	116.08	17.24
Lao PDR	12.64	15.30	2.67	21.09	16.50	1.20	7.84
Malaysia	-	-	-	-	-	-	-
Myanmar	166.48	170.90	4.42	2.65	172.87	1.97	1.16
Philippines	0.63	0.61	-0.02	-2.40	0.61	0.00	0.00
Singapore	-	-	-	-	-	-	-
Thailand	118.89	110.48	-8.40	-7.07	109.37	-1.12	-1.01
Vietnam	146.10	198.80	52.70	36.07	199.00	0.20	0.10

Table 40 Soybean harvested area in ASEAN countries, 2009-2011

Unit: 1,000 Hectares

Country	2009 (2008/09)	2010 (2009/10)	change *2009 over 2008*		2011 (2010/11)	change *2010 over 2009*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**1,258.25**	**1,268.66**	**10.41**	**0.83**	**1,393.67**	**125.01**	**9.85**
Brunei	-	-	-	-	-	-	-
Cambodia	94.37	103.65	9.28	9.83	112.75	9.10	8.77
Indonesia	722.79	672.24	-50.55	-6.99	786.46	114.22	16.99
Lao PDR	12.64	15.30	2.67	21.09	16.49	1.19	7.78
Malaysia	-	-	-	-	-	-	-
Myanmar	166.48	170.90	4.42	2.65	172.87	1.97	1.16
Philippines	0.63	0.61	-0.02	-2.40	0.61	0.00	0.49
Singapore	-	-	-	-	-	-	-
Thailand	115.24	107.16	-8.09	-7.02	105.48	-1.68	-1.56
Vietnam	146.10	198.80	52.70	36.07	199.00	0.20	0.10

Note: Vietnam reported only planted area.

Table 41 Soybean yield in ASEAN countries, 2009-2011

Unit: Ton/Hectare

Country	2009 (2008/09)	2010 (2009/10)	change *2009 over 2008*		2011 (2010/11)	change *2010 over 2009*	
			Quantities	*(%)*		Quantities	*(%)*
ASEAN	**1.407**	**1.439**	**0.03**	**2.28**	**1.453**	**0.010**	**0.97**
Brunei	-	-	-	-	-	-	-
Cambodia	1.455	1.619	0.16	11.29	1.700	0.080	5.02
Indonesia	1.348	1.346	0.00	-0.15	1.355	0.010	0.62
Lao PDR	1.537	1.634	0.10	6.28	1.789	0.150	9.48
Malaysia	-	-	-	-	-	-	-
Myanmar	1.442	1.484	0.04	2.95	1.511	0.030	1.83
Philippines	1.345	1.358	0.01	0.99	1.366	0.010	0.59
Singapore	-	-	-	-	-	-	-
Thailand	1.599	1.648	0.05	3.07	1.676	0.030	1.68
Vietnam	1.462	1.490	0.03	1.94	1.503	0.010	0.86

Note: Yield related to harvested area excepts Vietnam which related to planted area.

Table 42 Soybean damaged area in ASEAN by cause of damage, 2010

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Others	Total
ASEAN	**1,021**	**4,744**	**32**	**0**	**0**	**5,797**
Brunei	-	-	-	-	-	-
Cambodia	-	1,416	-	-	-	1,416
Indonesia	1,021	-	32	-	-	1,053
Lao PDR	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-
Philippines	-	-	-	-	-	-
Singapore	-	-	-	-	-	-
Thailand	-	3,328	-	-	-	3,328
Vietnam	-	-	-	-	-	-

Table 43 Soybean balance sheet of ASEAN countries, 2010

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**118,062**	**1,825,226**	**6,241,500**	**8,184,788**	**7,973,593**	**162,683**	**105,636**	**8,184,788**
Brunei	n.a.	-	519	519	519	0	n.a.	519
Cambodia	5,033	167,790	0	172,823	35,236	129,198	8,389	172,823
Indonesia	400	905,015	1,356,008	2,261,423	2,316,480	1,781	286	2,261,423
Lao PDR	n.a.	25,000	n.a.	25,000	25,000	n.a.	n.a.	25,000
Malaysia	0	-	501,307	501,307	471,635	29,672	0	501,307
Myanmar	0	253,680	nil	253,680	253,680	0	0	253,680
Philippines	0	830	86,609	87,439	87,439	0	0	87,439
Singapore	0	-	17,057	17,057	16,525	532	0	17,057
Thailand	112,329	176,611	1,680,000	1,968,940	1,870,729	1,500	96,711	1,968,940
Vietnam	300	296,300	2,600,000	2,896,600	2,896,350	0	250	2,896,600

Table 44 Soybean balance sheet of ASEAN countries, 2011

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**105,636**	**2,024,551**	**6,814,170**	**8,944,357**	**8,662,175**	**181,076**	**101,106**	**8,944,357**
Brunei	n.a.	-	535	535	535	0	0	535
Cambodia	8,389	191,668	0	200,057	40,250	147,584	12,223	200,057
Indonesia	286	1,065,332	1,401,431	2,467,049	2,464,830	1,727	492	2,467,049
Lao PDR	n.a.	29,500	n.a.	29,500	29,500	n.a.	n.a.	29,500
Malaysia	0	-	511,333	511,333	481,068	30,265	0	511,333
Myanmar	0	261,298	0	261,298	261,298	0	0	261,298
Philippines	0	839	90,871	91,710	91,710	n.a.	n.a.	91,710
Singapore[1]	0	-	20,000	20,000	20,000	0	0	20,000
Thailand	96,711	176,764	1,890,000	2,163,475	2,073,884	1,500	88,091	2,163,475
Vietnam[1/]	250	299,150	2,900,000	3,199,400	3,199,100	0	300	3,199,400

Table 45 Ratio of soybean production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

Unit: Tons

Country	2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**1,825,226**	**7,973,593**	**22.89**	**2,024,551**	**8,662,175**	**23.37**
Brunei	-	519	0	-	535	0
Cambodia	167,790	35,236	476.19	191,668	40,250	476.19
Indonesia	905,015	2,316,480	39.07	1,065,332	2,464,830	43.22
Lao PDR	25,000	25,000	100.00	29,500	29,500	100.00
Malaysia	-	471,635	0	-	481,068	0
Myanmar	253,680	253,680	100.00	261,298	261,298	100.00
Philippines	830	87,439	0.95	839	91,710	0.91
Singapore	-	16,525	0	-	20,000	0
Thailand	176,611	1,870,729	9.44	176,764	2,073,884	8.52
Vietnam	296,300	2,896,350	10.23	299,150	3,199,100	9.35

Table 46 Ratio of soybean beginning stock to domestic utilization in ASEAN countries (Food security ratio)

Unit: Tons

Country	2010			2011		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**118,062**	**7,973,593**	**1.48**	**105,636**	**8,662,175**	**1.22**
Brunei	n.a.	519	-	n.a.	535	-
Cambodia	5,033	35,236	14.28	8,389	40,250	20.84
Indonesia	400	2,316,480	0.02	286	2,464,830	0.01
Lao PDR	n.a.	25,000	-	n.a.	29,500	0
Malaysia	0	471,635	0	0	481,068	0
Myanmar	0	253,680	0	0	261,298	0
Philippines	0	87,439	0	0	91,710	0
Singapore	0	16,525	0	0	20,000	0
Thailand	112,329	1,870,729	6.00	96,711	2,073,884	4.66
Vietnam	300	2,896,350	0.01	250	3,199,100	0.01

Table 47 FOB Price of soybeans in selected ASEAN countries

Unit : US$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	2009	498	522	522	522	534	542	538	531	516	426	492	540	515
	2010	523	523	500	523	523	500	523	500	500	476	452	476	502

Table 48 CIF Price of soybeans in selected ASEAN countries

Unit : US$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Malaysia	2009	469	499	471	440	477	503	541	546	551	526	548	477	504
	2010	502	393	501	471	494	476	524	494					482
Singapore	2009	726	699	706	691	674	685	695	719	692	685	706	640	693
	2010	649	649	656	658	659	653	644	667	643	666			654
Thailand	2009	712	423	342	412	416	466	482	494	479	462	455	449	466
	2010	477	459	477	438	431	426	436	438	461	451			449

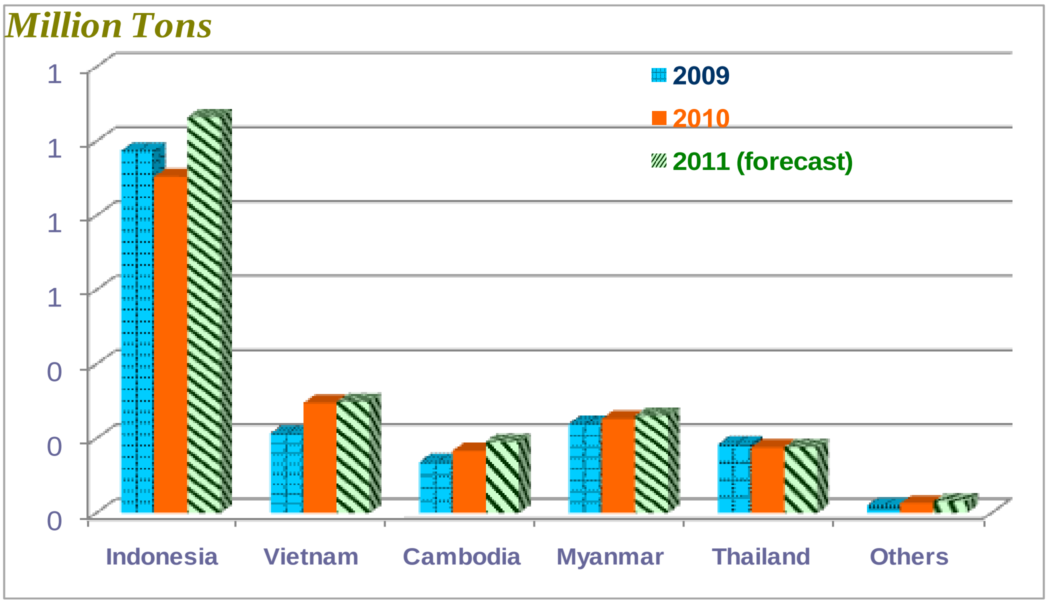


Figure 45 Soybean production of selected countries in ASEAN, 2009-2011

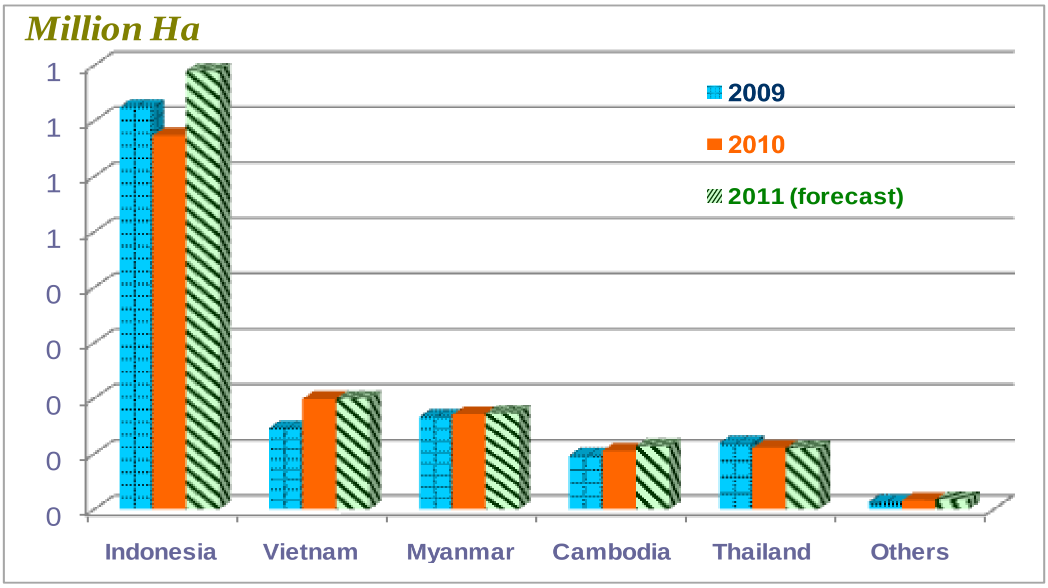


Figure 46 Soybean planted area of selected countries in ASEAN, 2009-2011

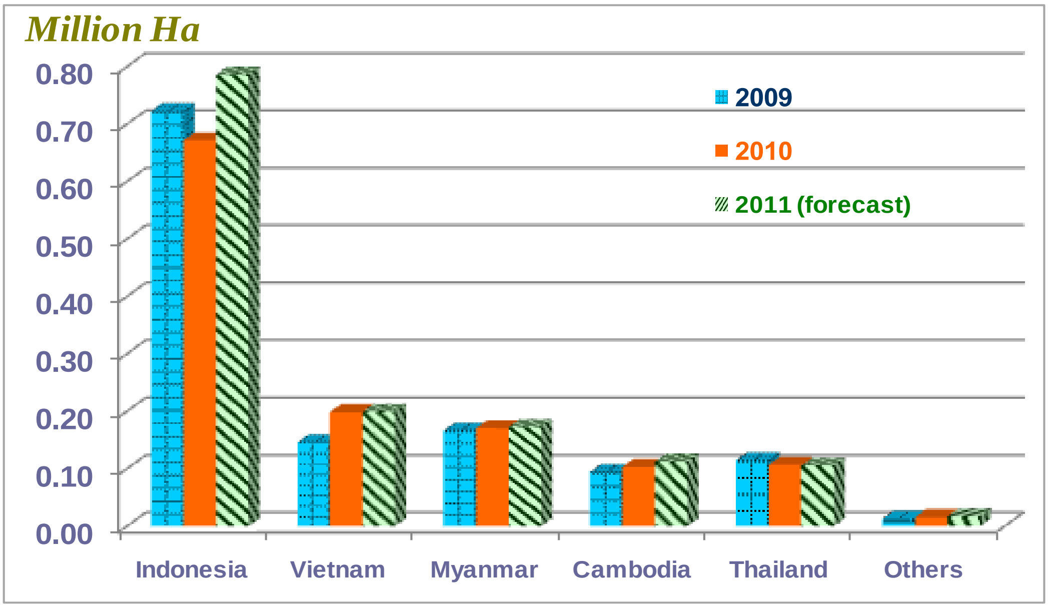


Figure 47 Soybean harvested area of selected countries in ASEAN, 2009-2011

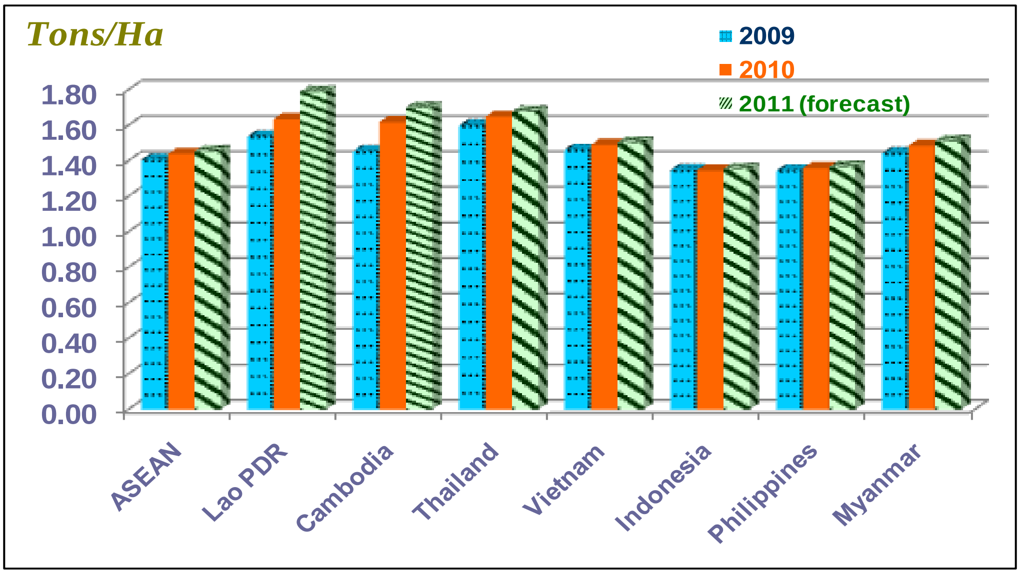


Figure 48 Soybean yield of selected countries in ASEAN, 2009-2011

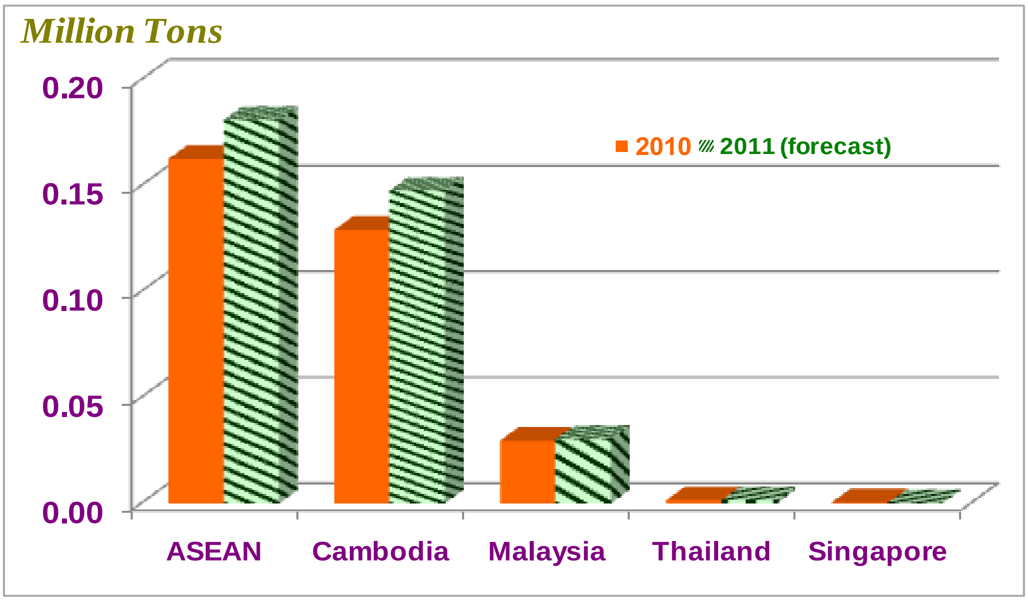


Figure 49 Amount of soybean export (million tons) of selected countries in ASEAN in 2010-2011

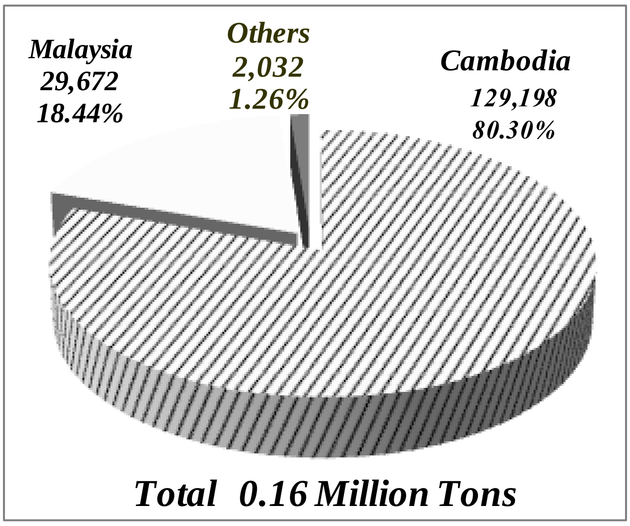


Figure 50 Share of soybean export (tons) among ASEAN countries, 2010

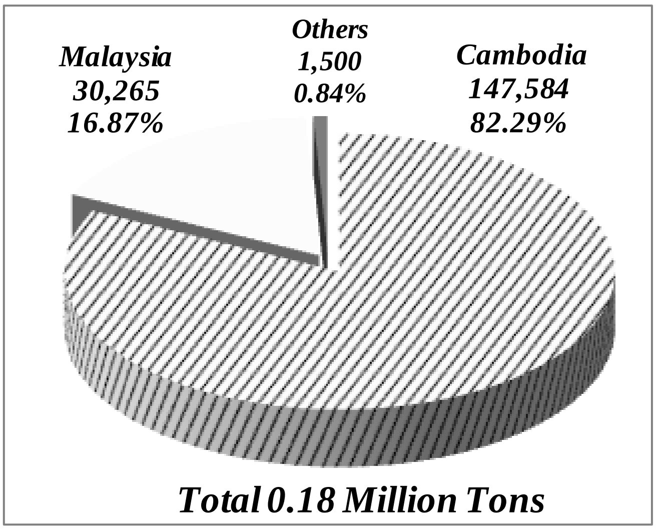


Figure 51 Share of soybean export (tons) among ASEAN countries, 2011

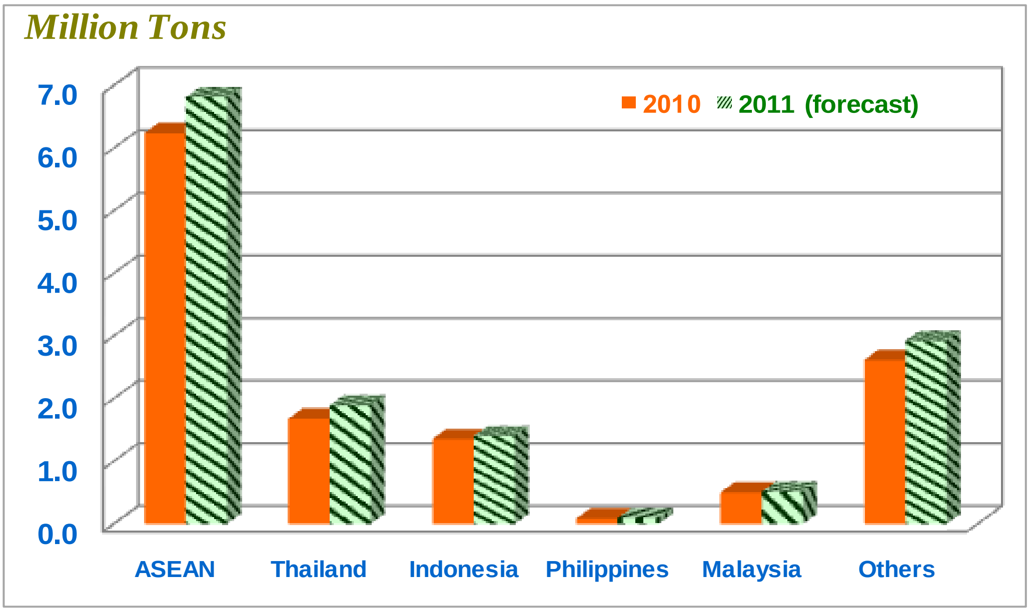
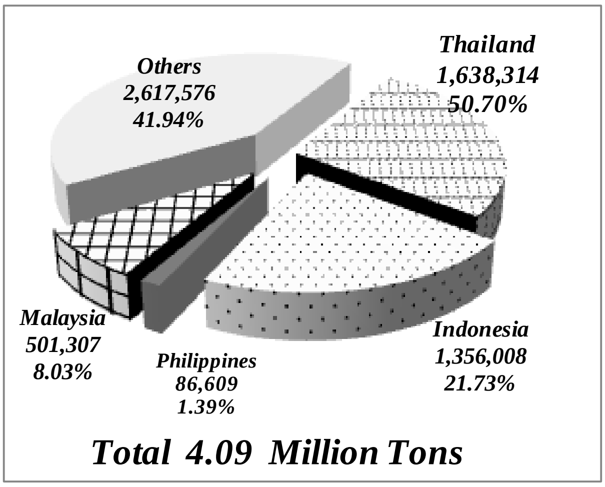


Figure 52 Amount of soybean import (million tons) by selected countries in ASEAN in 2010-2011



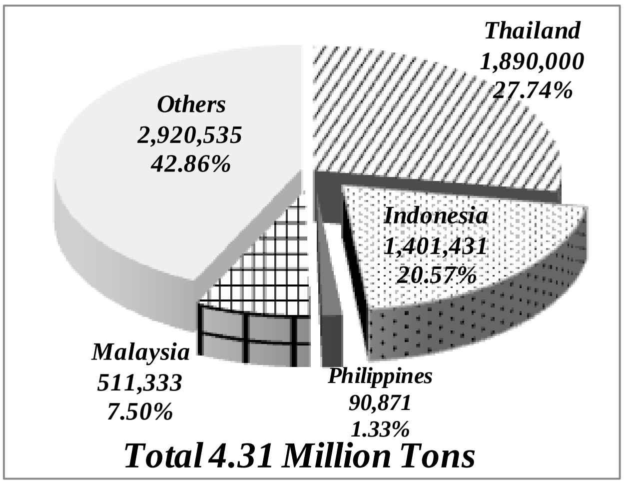


Figure 53 Share of soybean import (ton) among ASEAN countries, 2010

Figure 54 Share of soybean import (ton) among ASEAN countries, 2011

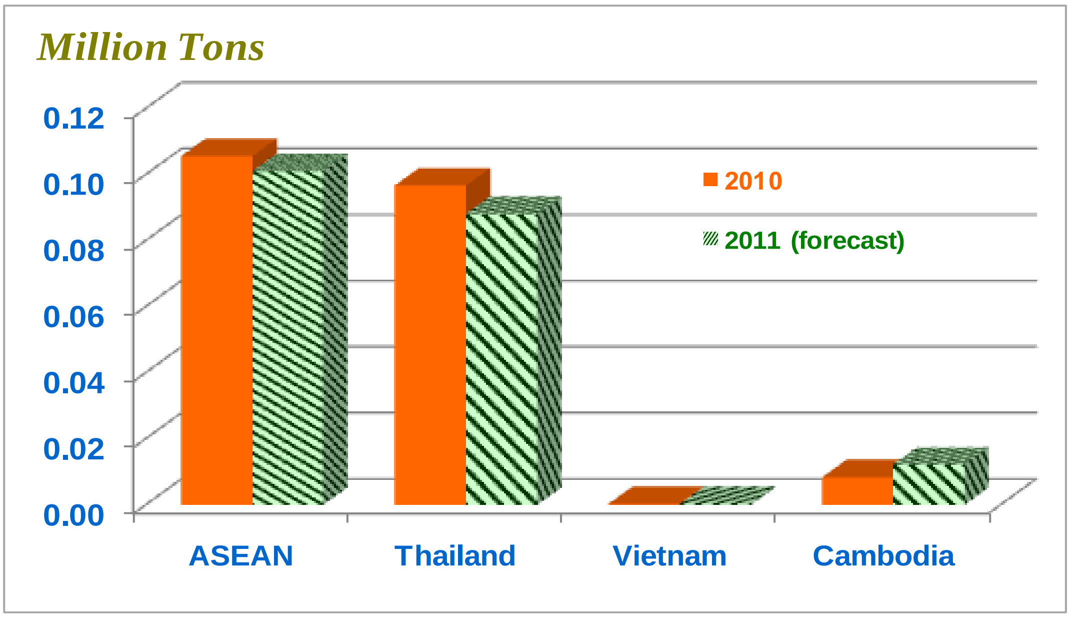


Figure 55 Amount of ending stock of soybean in ASEAN countries

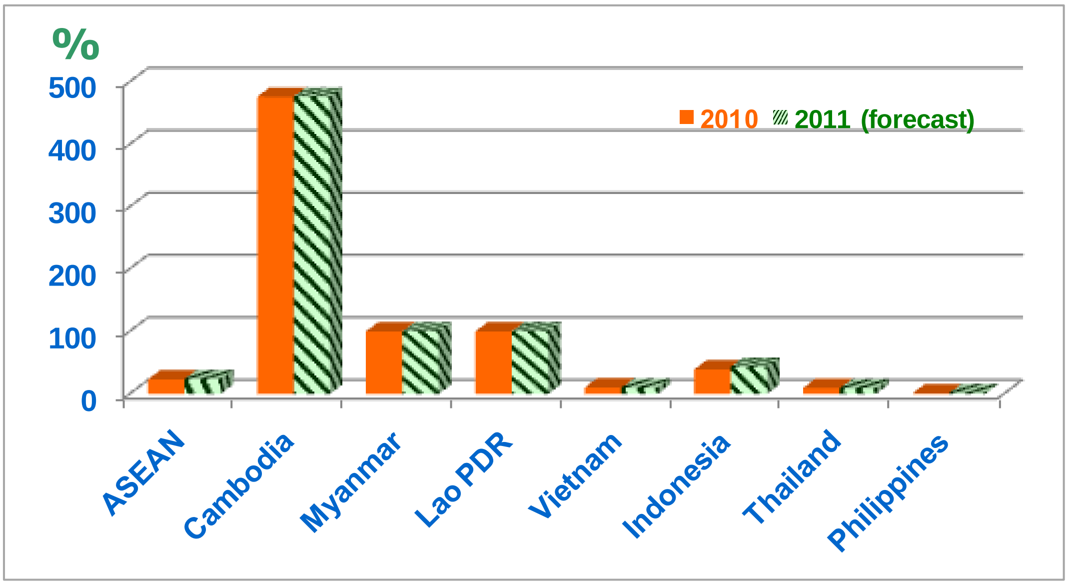


Figure 56 Ratio of soybean production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

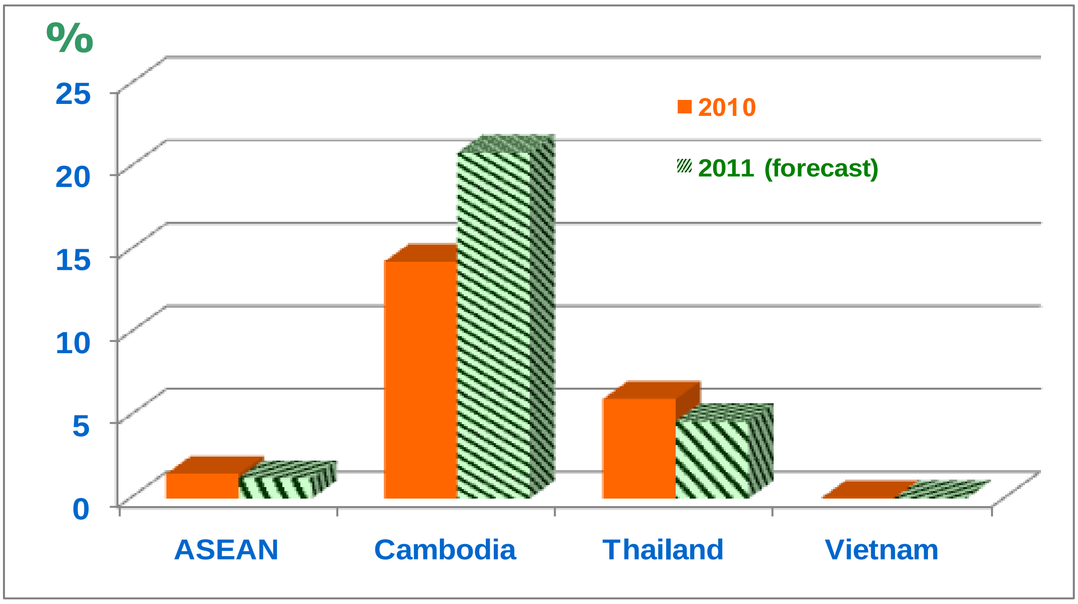


Figure 57 Ratio of soybean beginning stock to domestic utilization in ASEAN countries (Food security ratio)

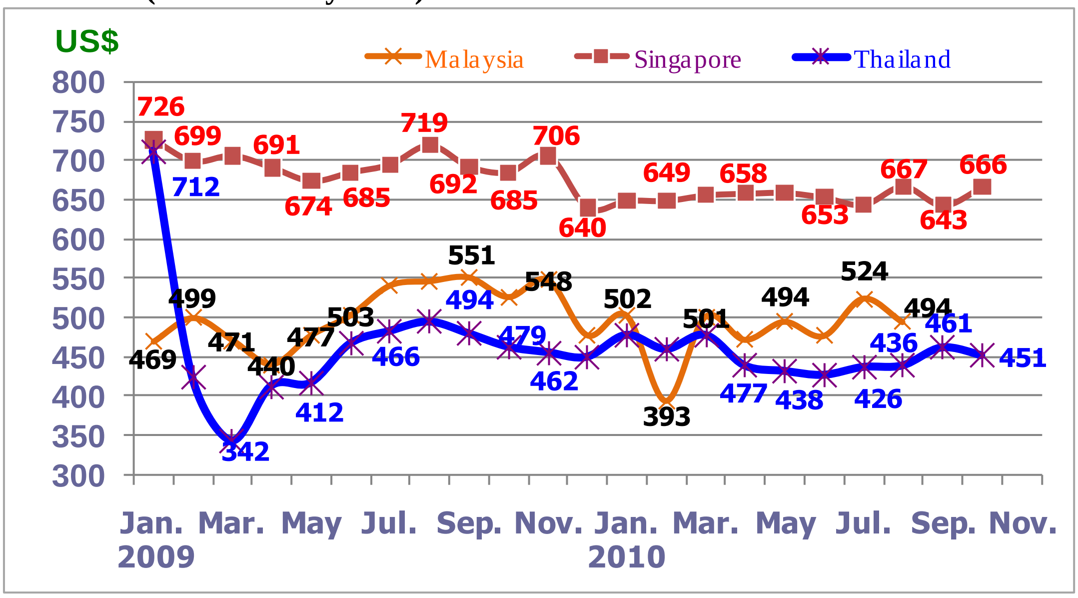


Figure 58 CIF price (US$) of Soybean of selected countries in ASEAN in 2009-2010

Explanatory notes

Production of Paddy for 2011

Brunei:

- Wet season refers to the crop harvested during August to October 2011.
- Dry season refers to the crop harvested during February to April 2011.

Cambodia:

- Wet season refers to the crop harvested during August to December 2010.
- Dry season refers to the crop harvested during January to March 2011.

Indonesia:

- Sumatera refers to the crop harvested during May to July 2011 and the crop harvested during November 2011 to January 2012.
- Jawa Bali and West Nusa refer to the crop harvested during April to July 2011 and the crop harvested during October to December 2011.
- East Nusa refers to the crop harvested during June to September 2011.
- Kalimantan refers to the crop harvested during March to June 2011 and the crop harvested during August to November 2011.
- Sulawesi refers to the crop harvested during June to August 2011 and the crop harvested during November 2011 to January 2012.
- Maluku and Papua refer to the crop harvested during April to July 2011 and the crop harvested during August to November 2011.

Lao PDR:

- Wet season refers to the crop harvested during September 2010 to January 2011.
- Dry season refers to the crop harvested during February to May 2011.

Malaysia:

- Wet season refers to the crop harvested during December 2010 to June 2011.
- Dry season refers to the crop harvested during July to November 2011.

Myanmar:

- Wet season refers to the crop harvested during August 2010 to January 2011.
- Dry season refers to the crop harvested during February to August 2011.

Philippines:

- Wet season refers to the crop harvested during September to December 2011.
- Dry season refers to the crop harvested during February to May 2011.

Thailand:

- Wet season refers to the crop harvested during August 2010 to April 2011. The bulk of harvest occurred in November - December 2010.
- Dry season refers to the crop harvested during February to October 2011.

Vietnam:

Spring-season

- North refers to the crop harvested during June to July 2011.
- South refers to the crop harvested during February to May 2011.

Autumn-season

- North refers to the crop harvested during August to September 2011.
- South refers to the crop harvested during July to September 2011.

Winter-season

- North refers to the crop harvested during October to November 2011.
- South refers to the crop harvested during October 2010 to January 2010.

Production of Maize for 2011

Cambodia:

- 1st crop harvested during February to March 2011.
- 2nd crop harvested during August to October 2011.

Indonesia:

- 1st crop harvested during January to October 2011.
- 2nd crop harvested during January to October 2011.

Lao PDR:

- 1st crop harvested during June to July 2011.
- 2nd crop harvested during September to December 2011.

Malaysia:

- 1st crop harvested during April to May 2011.
- 2nd crop harvested during September to November 2011.

Myanmar:

- 1st crop harvested during January to March 2011.
- 2nd crop harvested during August to November 2011.

Philippines:

- 1st crop harvested during February to May 2011.
- 2nd crop harvested during July to November 2011.

Thailand:

- 1st crop harvested during February to July 2011.
- 2nd crop harvested during August 2011 to January 2012.

Vietnam:

- 1st crop harvested during January to March 2011.
- 2nd crop harvested during April to September 2011.
- 3rd crop harvested during July 2011 to January 2012.

Production of Sugarcane for 2011

Cambodia:

- 1st crop harvested during April to June 2011.
- 2nd crop harvested during October to December 2011.

Indonesia:

- 1st crop harvested during May to July 2011.
- 2nd crop harvested during September to November 2011.

Lao PDR:

- The crop harvested during December 2010 to June 2011.

Myanmar:

- The crop harvested during October 2010 to April 2011.

Philippines:

- The crop harvested during October 2010 to June 2011.

Thailand:

- The crop harvested during November 2010 to May 2011.

Vietnam:

- The crop harvested during November 2010 to May 2011.

Production of Soybeans for 2011

Cambodia:

- The crop harvested during half November to December 2011.

Indonesia:

- 1st crop harvested during January to April 2011.
- 2nd crop harvested during May to August 2011.
- 3rd crop harvested during September to December 2011.

Lao PDR:

- 1st crop harvested during January to February 2011.
- 2nd crop harvested during September to October 2011.

Myanmar:

- 1st crop harvested during September to December 2010.
- 2nd crop harvested during January to March 2011.

Philippines:

- 1st crop harvested during January to June 2011.
- 2nd crop harvested during July to December 2011.
-

Thailand:

- 1st crop harvested during February to May 2011.
- 2nd crop harvested during July to December 2011.

Vietnam:

- 1st crop harvested during February to May 2011.
- 2nd crop harvested during August to November 2011.

Domestic Utilization, Stock, Import and Export: refer to calendar year

NA : The data is not available due to there is no collecting or reporting systems in the country yet.

Nil : Small amount

Milling Rate of Rice (2010)

Unit: ton

Country	Paddy	Rice
ASEAN	1	0.636
Brunei	1	0.650
Cambodia	1	0.640
Indonesia	1	0.632
Lao PDR	1	0.600
Malaysia	1	0.644
Myanmar	1	0.630
Philippines	1	0.650
Thailand	1	0.660
Vietnam	1	0.622

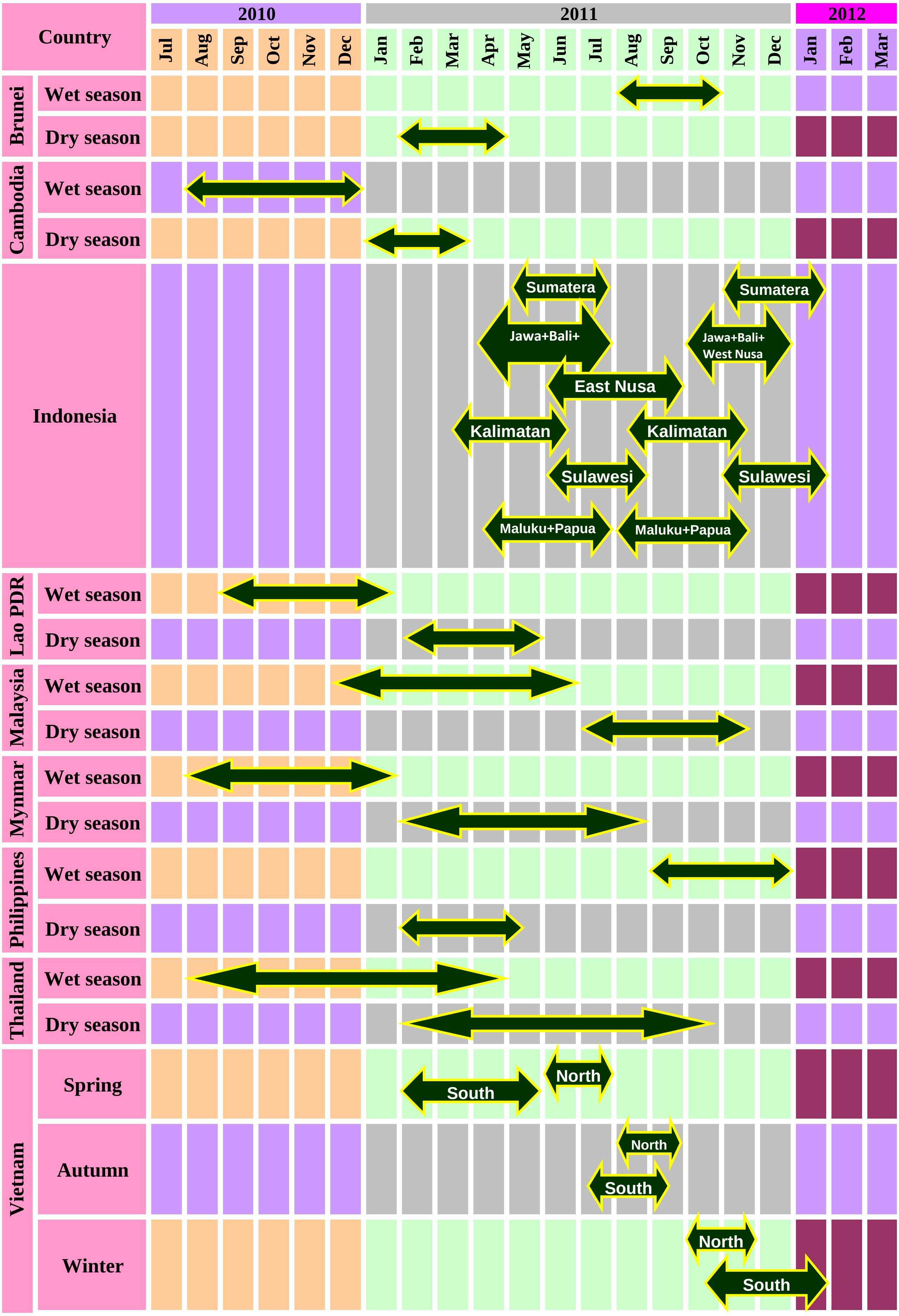
Extraction Rate of Sugar (2010)

Unit: tons

Country	Sugarcane	Sugar
ASEAN	1000	105.886
Brunei	-	-
Cambodia	1000	100.000
Indonesia	1000	153.846
Lao PDR	1000	100.000
Malaysia	-	-
Myanmar	1000	100.000
Philippines	1000	99.356
Thailand	1000	100.697
Vietnam	1000	83.333

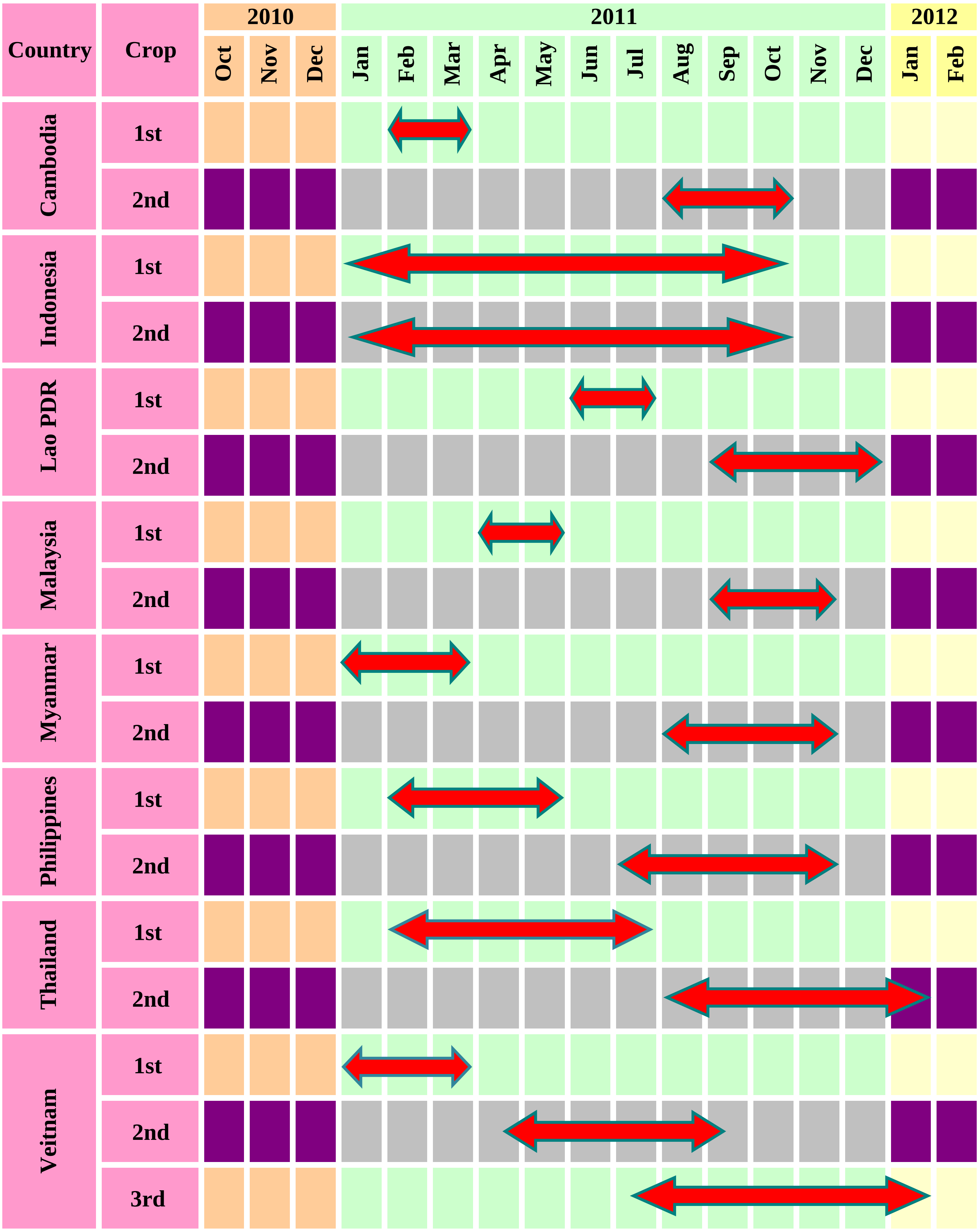
ANNEX 1

Rice crop calendar (harvested months) for crop year 2010/11 (2011) in ACO-5 report



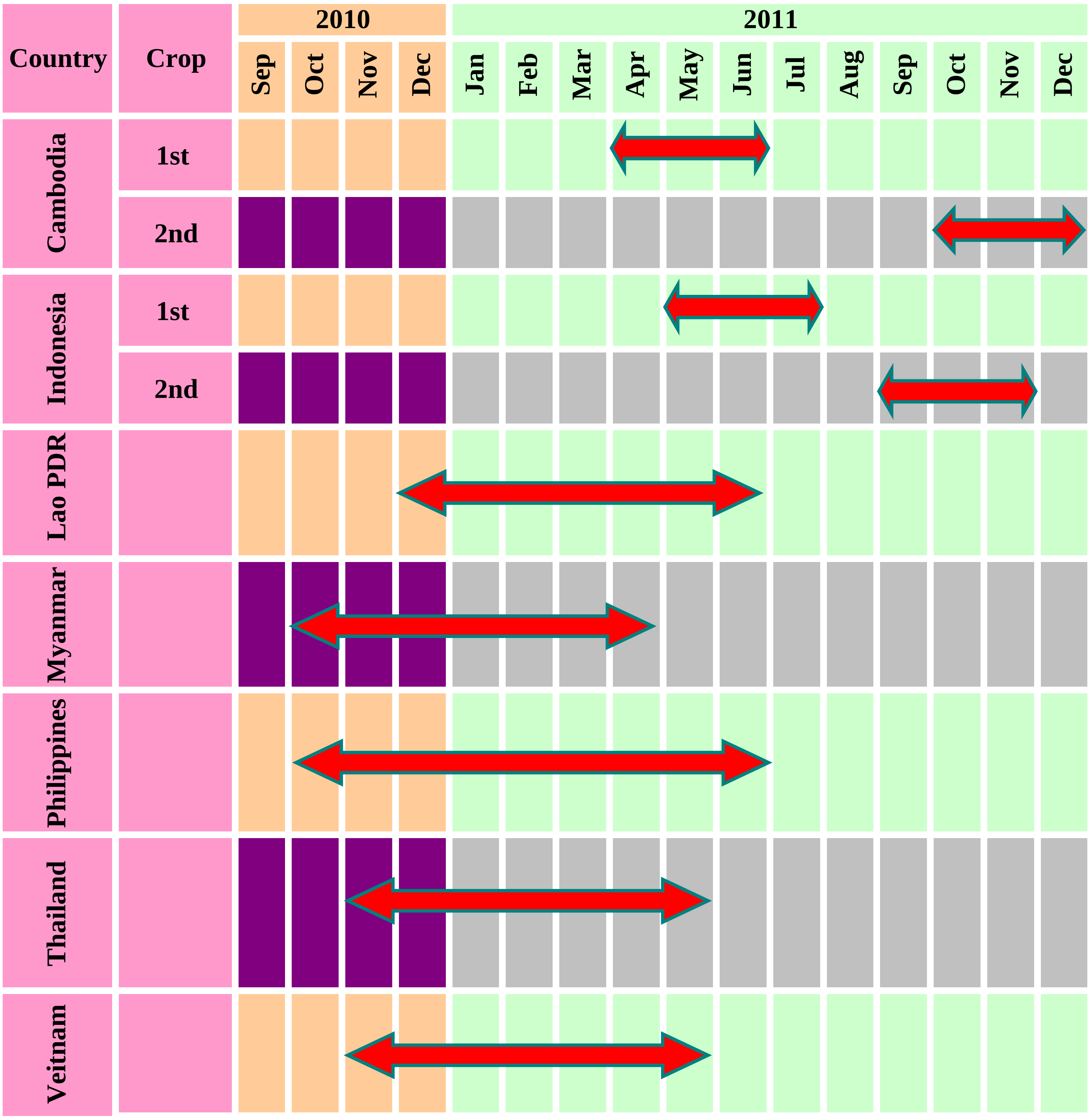
ANNEX 2

Maize crop calendar (harvested months) for crop year 2010/11 (2011) in ACO-5 report



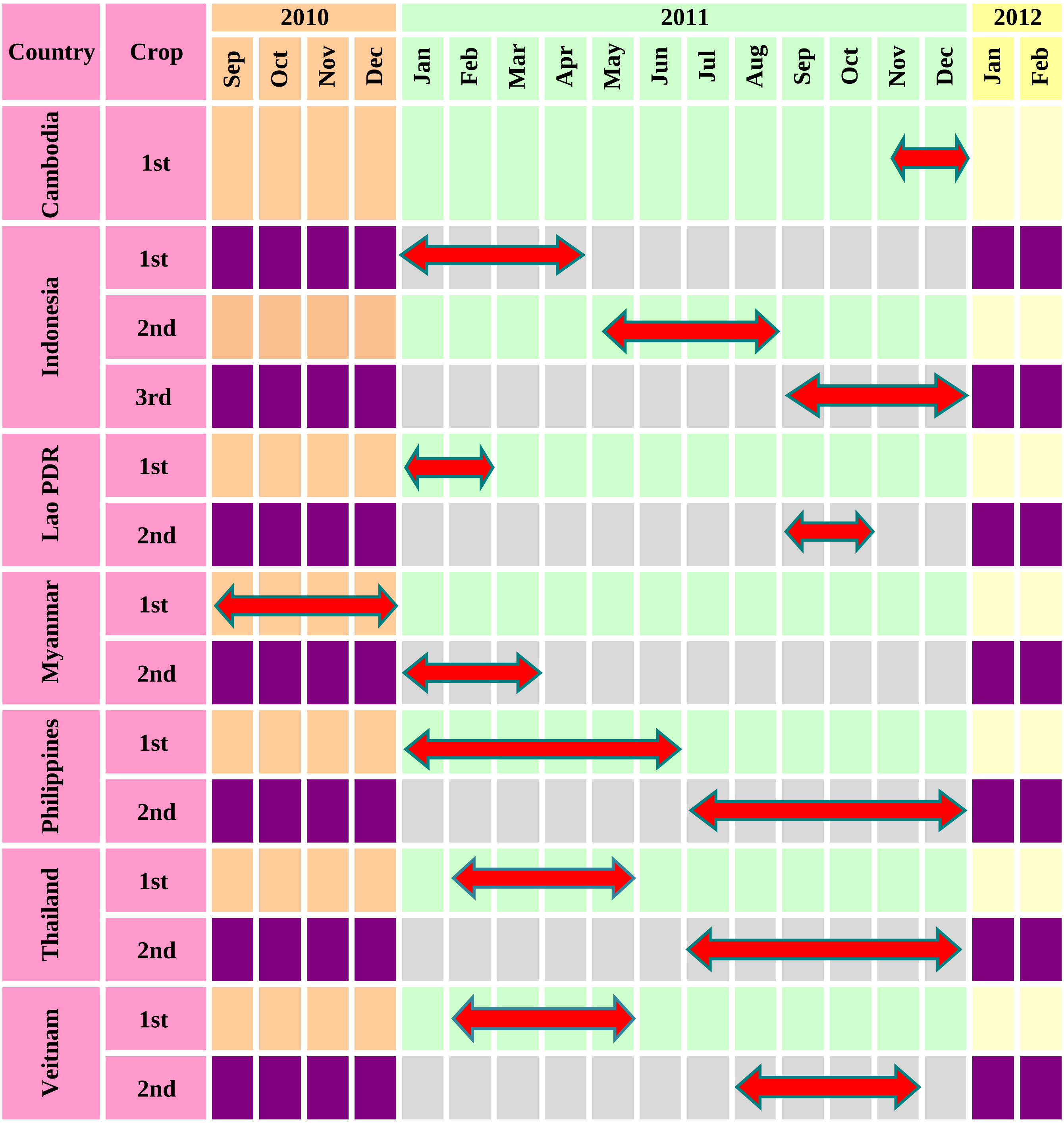
ANNEX 3

Sugarcane **c**rop calendar (harvested months) for crop year 2010/11 (2011) in ACO-5 report



ANNEX 4

Soybean **c**rop calendar (harvested months) for crop year 2010/11 (2011) in ACO-5 report



ANNEX 5

List of Delegates

The Fifth Agricultural Commodity Outlook Committee Meeting

Dusit Thani, Pattaya, Thailand

20-21 December 2010

	Name	Position
1.	Mr. Montol Jeamchareon	AFSIS Project Manager Chairman of the Meeting Ministry of Agriculture and Cooperatives Thailand
2.	Mr. Suriyan Vichitlekarn	Assistant Director and Head Agriculture Industries & Natural Resources Division
3.	Dr. Haji Amzah b.Haji Abdul Rahman	Head of International Trade Department of Agriculture and Agrifood Ministry of Industry and Primary Resources Brunei Darussalam
4.	Mr.Tuor Vannak	Deputy Chief of Statistics Office Department of Planning and Statistics Ministry of Agriculture Forestry and Fisheries Cambodia
5.	Dr. Togar Napitupulu	Senior Lecturer Graduate School Binus University Indonesia
6.	Ms. Vivanh Souvannamethy	Deputy Director Center for Statistics and Information Department of Planning Ministry of Agriculture and Forestry Lao PDR
7.	Ms.Yeoh Gim Bee	Undersecretary Strategic Planning & International Division Ministry of Agriculture and Agro-Based Industry Malaysia
8.	Dr. Win Htut	Deputy Director Settlement and Land Records Department Ministry of Agriculture and Irrigation Myanmar

9.	Mr. Romeo S. Recide	Director Bureau of Agricultural Statistics Philippines
10.	Ms.Nareenat Roonnaphai	Deputy Secretary-General Office of Agricultural Economics Ministry of Agriculture and Cooperatives Thailand
11.	Dr. Nguyen Viet Chien	Director Center for Informatics and Statistics Ministry of Agriculture and Rural Development Vietnam
12.	Mr. Hosaka Masahiro	Section Chief Statistics Planning Division Statistics Department Ministry of Agriculture, Forestry and Fisheries Japan
13.	Dr. Apichart Pongsrihadulchai	AFSIS Consultant Adviser to the Minister Ministry of Agriculture and Cooperatives Thailand