ASEAN FOOD SECURITY INFORMATION SYSTEM (AFSIS) PROJECT

Report on

ASEAN Agricultural Commodity Outlook

No. 6 June 2011

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ASEAN Food Security Information and Training (AFSIT) Center
Office of Agricultural Economics (OAE)
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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. The fifth Report, soybeans has been included. This sixth report contains information of 5 commodities which are rice, maize, sugarcane soybeans and cassava. 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 23 - 24 May 2011 in Bangkok, Thailand for the provision of additional information and revision of this Report. The list of delegates in the Meeting is presented in the ANNEX 6.

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.

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ASEAN Agricultural Commodity Outlook

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Highlights of Rice Outlook

- Rice supply in ASEAN is forecast to increase about 3.34 percent from 154.60 million tons of milled rice in 2010 to 159.76 million tons in 2011.
- The increase in supply is mostly due to the increase in stock carried over from previous year.
- The rice production in 2011 is forecast to be 130.91 million tons, up from 126.92 million tons in 2010, an increase of 3.99 million tons or 3.14 percent.
- The beginning stock of 2011 is estimated at 26.67 million tons up from 24.0 million tons in 2010 which is about 11.13 percent while the ending stock is forecast to increase from 26.67 million tons to 29.30 million tons during the same period which is about 9.86 percent.
- The rice export from ASEAN countries is forecast to increase from 18.60 million tons in 2010 to 19.92 million tons in 2011 and the rice import by ASEAN countries in 2011 is predicted to decrease from 3.68 million tons to 2.18 million tons which is about 40.76 percent decrease.
- The ratio of production to domestic utilization (self-sufficiency ratio) is forecast to change very little from 116.08 percent in 2010 to 118.43 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 21.95 percent in 2010 to 24.13 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)	154.60	159.76	5.16	3.34
Beginning stock	24.00	26.67	2.67	11.13
Production	126.92	130.91	3.99	3.14
Import	3.68	2.18	-1.50	-40.76
Demand (Million tons)	154.60	159.76	5.16	3.34
Domestic utilization	109.34	110.54	1.20	1.10
Export	18.60	19.92	1.32	7.10
Ending stock	26.67	29.30	2.63	9.86
Ratio of production to domestic utilization (%)	116.08	118.43	2.35	2.02
Ratio of beginning stock to domestic utilization (%)	21.95	24.13	2.18	9.93

ASEAN Rice Situation in 2010

Production

The estimate of paddy production in ASEAN for 2010 (crop year 2009/10) was 199.58 million tons, an increase of 3.47 million tons which is about 1.77 percent from 196.10 million tons in 2009. The present production estimate of 2010 has been revised downward from 199.85 million tons in EWI report in March 2011.The increase in production was mainly due to the expansion of the planted area which the increase in yield is less than one percent. The production has increased in many countries except Lao PDR, Malaysia and 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 was about the same. The total area harvested in 2010 is higher than total area harvested in 2009 which was damaged by the flood and pests. The yield has decreased due to the flood during the first crop. (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 farmers' response to the price increase and favorable weather together with the reduction of the price of competing crops. The increase in yield was due to the farmers used more fertilizer and used more improved varieties as well as the favorable weather.

For **Indonesia**, the increase in production was due to the increase in both harvested area and yield. There are three crops planted in Indonesia. Even though the harvested area of the first and the second crop has decreased, the overall harvested area has increased due to the increase the third crop which is the major crop. The increase in the planted area was a result of government policy and higher price received by the farmers together with favorable weather. The average yield in the first and second crops has decreased due to the drought, flood, pests and disease, while the yield of the third crop has increased due to the farmers used more improved varieties and good practice and proper used of input by the farmers including the favorable weather.

In **Lao PDR**, the decrease in total production was due to the reduction in planted area of the first crop even though the area of the second crop has increased. The decrease in area has occurred in major (first) 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 of the first crop has also decreased due to drought, flood and pest. For the second crop, even though the yield has decreased due to the unfavorable weather, the production has increased due to the expansion of the planted area. However, aggregately, the average yield has decreased which led to the decrease in production.

In **Malaysia,** the increase in production is attributed to the increase in yield only 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 received by farmers 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 of 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 planted 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 total production was mainly derived from the increase in both area and yield. The expansion of the area was attributed to the increase in the planted area of the first and the second crop due to the farmers' response to the profitable prices For the third crop, however, the planted area has decreased due to the unfavorable weather. The increase in yield was due to the farmer used more improved variety 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 109.34 million tons of milled rice (Table 7). The ratio of production to domestic utilization (self-sufficiency ratio) for 2010 was 116.08 percent ratio has reduced slightly. ASEAN as a whole still produced 16.08 percent more than utilization within the region (Table 9, Figure 12). 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 24.00 million tons while the ending stock was estimated at 26.67 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 21.72 million tons or about 81.46 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 21.95 percent in 2010 compared with 19.37 percent in 2009 (Table 10, Figure 13). This is in a better situation in terms of rice security for the region.

Trade

In 2010, ASEAN altogether exported about 18.60 million tons of milled rice (Table 7, Figure 5 and 6). Thailand and Vietnam, the two major exporting countries, exported about 8.94 million tons and 6.89 million tons, respectively. Cambodia and Myanmar, on the other hand, exported about 1.70 million tons and 1.0 million tons, respectively.

For the imports, ASEAN as a whole imported about 3.68 million tons. The major importing countries are the Philippines and Malaysia which imported about 2.38 million tons and 0.78 million tons, respectively (Table 7, Figure 8 and 9).

Prices

The annual average FOB prices of 5% rice in 2010 for Cambodia and Vietnam were higher than in 2009.For Thailand, the average prices of 5% rice were lower, while the Hommali rice the average prices in 2010 was higher than in 2009. Comparing FOB prices of 5% broken rice among the exporting countries, Cambodia received the highest price, followed by Thailand and Vietnam.

For Malaysia, the average CIF prices of rice in 2010 were the same as compared with 2009 prices. For the Philippines, the average CIF prices of all kinds of rice in 2010 were 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 1.37 million 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 damage 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 207.04 million tons, up 7.46 million tons or 3.74 percent as compared to 199.58 million tons in 2010 (Table 2, Figure 1). The production is predicted to increase in most countries. In Thailand the increase in production was due to the expansion of area as a result of the high price received by the farmers under the income guarantee scheme of the government. 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 110.54 million tons, an increase of about 1.20 million tons or 1.10 percent from 109.34 million tons in 2010. (Table 7 and 8).

The beginning stock in ASEAN is estimated to increase to 26.67 million tons which is 2.67 million tons or 11.13 percent higher than the 24.0 million tons in 2010. The ending stock is also expected to increase by 2.63 million tons or 9.86 percent from 26.67 million tons in 2010 to 29.30 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 116.08 percent in 2010 to 118.43 percent in 2011 (Table 9, Figure 12). The self–sufficiency situation for the ASEAN is, therefore, considered to be about the same.

The ratio of rice stock to domestic utilization (food security ratio) is forecast to increase significantly from 21.95 percent in 2010 to 24.13 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. There are four countries namely, Indonesia, Lao PDR, Cambodia and Singapore that 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 increase from 18.60 million tons in 2010 to 19.92 million tons in 2011 (Table 7 and 8, Figure 5 and 7). The increase in export is expected in Thailand, Vietnam Cambodia and Singapore while Myanmar, Indonesia and Lao PDR are expected to be the same or change very little from previous year.

For import, ASEAN as a whole is expected to import about 2.18 million tons, about 1.50 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 which plan to import about 0.86 million tons in 2011 as compared with 2.38 million tons in 2010.

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	**196,102.00**	**199,576.16**	**3,474.16**	**1.77**	**207,040.18**	**7,464.02**	**3.74**
Brunei	1.37	1.65	0.28	20.22	1.87	0.22	13.18
Cambodia	7,175.47	7,585.87	410.40	5.72	8,249.45	663.58	8.75
Indonesia	64,398.89	66,411.47	2,012.58	3.13	67,307.32	895.86	1.35
Lao PDR	3,144.81	3,070.64	-74.17	-2.36	3,450.00	379.36	12.35
Malaysia	2,511.04	2,464.83	-46.21	-1.84	2,665.10	200.27	8.12
Myanmar	32,057.87	32,165.12	107.25	0.33	32,488.01	322.90	1.00
Philippines	16,266.42	15,772.32	-494.10	-3.04	17,034.47	1,262.15	8.00
Singapore	-	-	-	-	-	-	-
Thailand	31,650.63	32,116.06	465.43	1.47	34,484.96	2,368.89	7.38
Vietnam	38,895.50	39,988.20	1,092.70	2.81	41,359.00	1,370.80	3.43

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**	**49,881.26**	**1,411.67**	**2.91**	**50,582.48**	**701.22**	**1.41**
Brunei	1.73	1.85	0.12	6.76	1.72	-0.13	-7.15
Cambodia	2,616.53	2,720.38	103.85	3.97	2,795.89	75.51	2.78
Indonesia	12,948.59	13,938.41	989.83	7.64	13,405.98	-532.43	-3.82
Lao PDR	904.28	899.45	-4.83	-0.53	925.00	25.56	2.84
Malaysia	674.93	677.88	2.96	0.44	683.68	5.79	0.85
Myanmar	8,094.30	8,066.65	-27.65	-0.34	8,107.90	41.24	0.51
Philippines	4,617.18	4,427.84	-189.34	-4.10	4,507.49	79.65	1.80
Singapore	-	-	-	-	-	-	-
Thailand	11,171.96	11,635.19	463.23	4.15	12,461.83	826.63	7.10
Vietnam	7,440.10	7,513.60	73.50	0.99	7,693.00	179.40	2.39

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**	**48,511.35**	**735.39**	**1.54**	**49,872.42**	**1,361.07**	**2.81**
Brunei	1.06	1.56	0.50	46.87	1.54	-0.02	-0.97
Cambodia	2,613.36	2,674.60	61.24	2.34	2,777.32	102.72	3.84
Indonesia	12,883.58	13,244.18	360.61	2.80	13,258.69	14.51	0.11
Lao PDR	872.90	855.11	-17.78	-2.04	925.00	69.89	8.17
Malaysia	671.49	668.58	-2.91	-0.43	678.23	9.65	1.44
Myanmar	8,077.61	8,058.15	-19.46	-0.24	8,073.24	15.08	0.19
Philippines	4,532.31	4,354.16	-178.15	-3.93	4,497.85	143.68	3.30
Singapore	-	-	-	-	-	-	-
Thailand	10,683.55	11,141.39	457.85	4.29	11,967.55	826.16	7.42
Vietnam	7,440.10	7,513.60	73.50	0.99	7,693.00	179.40	2.39

Note: Vietnam reported only planted area.

Table 5 Paddy 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	**4.10**	**4.11**	**0.01**	**0.24**	**4.15**	**0.04**	**0.97**
Brunei	1.29	1.06	-0.23	-17.83	1.21	0.15	14.15
Cambodia	2.75	2.84	0.09	3.27	2.97	0.13	4.58
Indonesia	5.00	5.01	0.01	0.20	5.08	0.07	1.40
Lao PDR	3.60	3.59	-0.01	-0.28	3.73	0.14	3.90
Malaysia	3.74	3.69	-0.05	-1.34	3.93	0.24	6.50
Myanmar	3.97	3.99	0.02	0.50	4.02	0.03	0.75
Philippines	3.59	3.62	0.03	0.84	3.79	0.17	4.70
Singapore	-	-	-	-	-	-	-
Thailand	2.96	2.88	-0.08	-2.70	2.88	0.00	0.00
Vietnam	5.23	5.32	0.09	1.72	5.38	0.06	1.13

Note: Yield related to havested 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	**87,196**	**222,069**	**360,676**	**3,679**	**2,065**	**1,369,914**
Brunei	51	8	44	32	157	291
Cambodia	40,027	5,681	69	-	-	45,777
Indonesia	n.a.	n.a.	n.a.	n.a.	n.a.	694,229
Lao PDR	13,973	27,580	2,398	n.a.	380	44,331
Malaysia	2,046	0	3,611	3,648	-	9,305
Myanmar	5,862	1,111	-	-	1,528	8,501
Philippines	14,502	59,179	0	0	0	73,681
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.

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	**24,002,069**	**126,920,370**	**3,677,790**	**154,600,228**	**109,335,104**	**18,596,554**	**26,668,570**	**154,600,228**
Brunei	18,628	1,072	28,551	48,250	32,365	0	15,885	48,250
Cambodia	322,303	4,854,957	0	5,177,260	2,961,392	1,699,235	516,633	5,177,260
Indonesia	2,376,810	41,972,048	220,681	44,569,539	39,033,702	810	5,535,027	44,569,539
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	0	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	10,315,097	2,378,057	15,322,254	11,897,714	240	3,424,300	15,322,254
Singapore	40,000	-	248,211	288,211	208,716	29,495	50,000	288,211
Thailand	7,702,300	21,196,600	nil	28,898,900	12,120,000	8,939,600	7,839,300	28,898,900
Vietnam	5,757,179	24,740,294	nil	30,497,473	19,270,086	6,886,200	4,341,187	30,497,473

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	**26,668,570**	**130,905,478**	**2,182,197**	**159,756,246**	**110,535,239**	**19,922,513**	**29,298,493**	**159,756,246**
Brunei	15,885	1,213	31,056	48,155	32,133	0	16,021	48,155
Cambodia	516,633	5,279,649	0	5,796,282	3,035,913	1,847,877	912,492	5,796,282
Indonesia	5,535,027	42,131,508	220,681	47,887,216	39,445,800	810	8,440,606	47,887,216
Lao PDR	259,919	1,936,458	20,460	2,216,837	1,828,433	38,826	349,578	2,216,837
Malaysia	677,202	1,688,110	750,000	3,115,312	2,510,669	0	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	3,424,300	11,140,545	860,000	15,424,845	12,184,242	-	3,240,603	15,424,845
Singapore	50,000	-	300,000	350,000	270,000	35,000	45,000	350,000
Thailand	7,839,300	22,760,000	nil	30,599,300	12,084,000	10,000,000	8,515,300	30,599,300
Vietnam	4,341,187	25,610,623	-	29,951,810	19,391,512	7,000,000	3,560,298	29,951,810

Note: nil = very small amount and the value of 2011 is forecasting value

Table 9 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2009-2011

Unit: Ton

Country	2009			2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**125,723,100**	**107,337,588**	**117.13**	**126,920,370**	**109,335,104**	**116.08**	**130,905,478**	**110,535,239**	**118.43**
Brunei	891	31,786	2.80	1,072	32,365	3.31	1,213	32,133	3.77
Cambodia	4,592,303	2,927,000	156.89	4,854,957	2,961,392	163.94	5,279,649	3,035,913	173.91
Indonesia	40,656,136	38,471,776	105.68	41,972,048	39,033,702	107.53	42,131,508	39,445,800	106.81
Lao PDR	1,886,880	1,795,642	105.08	1,886,880	1,747,787	107.96	1,936,458	1,828,433	105.91
Malaysia	1,585,708	2,422,828	65.45	1,641,985	2,470,558	66.46	1,688,110	2,510,669	67.24
Myanmar	20,196,456	19,434,132	103.92	20,311,437	19,592,784	103.67	20,357,372	19,752,537	103.06
Philippines	10,633,234	12,397,428	85.77	10,315,097	11,897,714	86.70	11,140,545	12,184,242	91.43
Singapore	-	262,000	-	-	208,716	-	-	270,000	-
Thailand	20,889,417	11,267,000	185.40	21,196,600	12,120,000	174.89	22,760,000	12,084,000	188.35
Vietnam	25,282,075	18,327,996	137.94	24,740,294	19,270,086	128.39	25,610,623	19,391,512	132.07

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

Unit: Ton

Country	2009			2010			2011		
	Production	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**20,792,403**	**107,337,588**	**19.37**	**24,002,069**	**109,335,104**	**21.95**	**26,668,570**	**110,535,239**	**24.13**
Brunei	15,505	31,786	48.78	18,628	32,365	57.56	15,885	32,133	49.44
Cambodia	128,000	2,927,000	4.37	322,303	2,961,392	10.88	516,633	3,035,913	17.02
Indonesia	1,172,435	38,471,776	3.05	2,376,810	39,033,702	6.09	5,535,027	39,445,800	14.03
Lao PDR	30,168	1,795,642	1.68	139,510	1,747,787	7.98	259,919	1,828,433	14.22
Malaysia	475,899	2,422,828	19.64	725,775	2,470,558	29.38	677,202	2,510,669	26.97
Myanmar	4,345,208	19,434,132	22.36	4,290,464	19,592,784	21.90	4,009,117	19,752,537	20.30
Philippines	2,638,287	12,397,428	21.28	2,629,100	11,897,714	22.10	3,424,300	12,184,242	28.10
Singapore	55,000	262,000	20.99	40,000	208,716	19.16	50,000	270,000	18.52
Thailand	6,251,800	11,267,000	55.49	7,702,300	12,120,000	63.55	7,839,300	12,084,000	64.87
Vietnam	5,680,101	18,327,996	30.99	5,757,179	19,270,086	29.88	4,341,187	19,391,512	22.39

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
		2011	535	560	550	570	565								556
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
		2011													
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	1,041	1,024
		2011	999	961	967	973	970								974
	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
		2011	525	538	507	490	489								510
Vietnam	Milled Rice 5%	2008	355	425	510	489	565	802	823	764	617	478	459	422	559
		2009	423	461	465	489	501	446	410	399	368	396	425	475	438
		2010	538	581	539	498	459	430	421	373	425	463	491	521	478
		2011	521	488	450										486

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	770	-	-	-	-	712
		2011	n.a.	n.a.	n.a.	n.a.									
	Rice 10%-25%	2008													
		2009			288	261	396	453	477	445		272		551	393
		2010	365	676		462		448	422	659	371				486
		2011	n.a.	n.a.	n.a.	n.a.									
	Broken rice	2008													
		2009			70	396	247	387	447	454		72			296
		2010			546	481	375		448						463
		2011	n.a.	n.a.	n.a.	n.a.									
Malaysia	Fragrant Rice	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	570	470	590	550	524
		2011	438	506											472
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	926	813
		2011	862	829	776	794									815

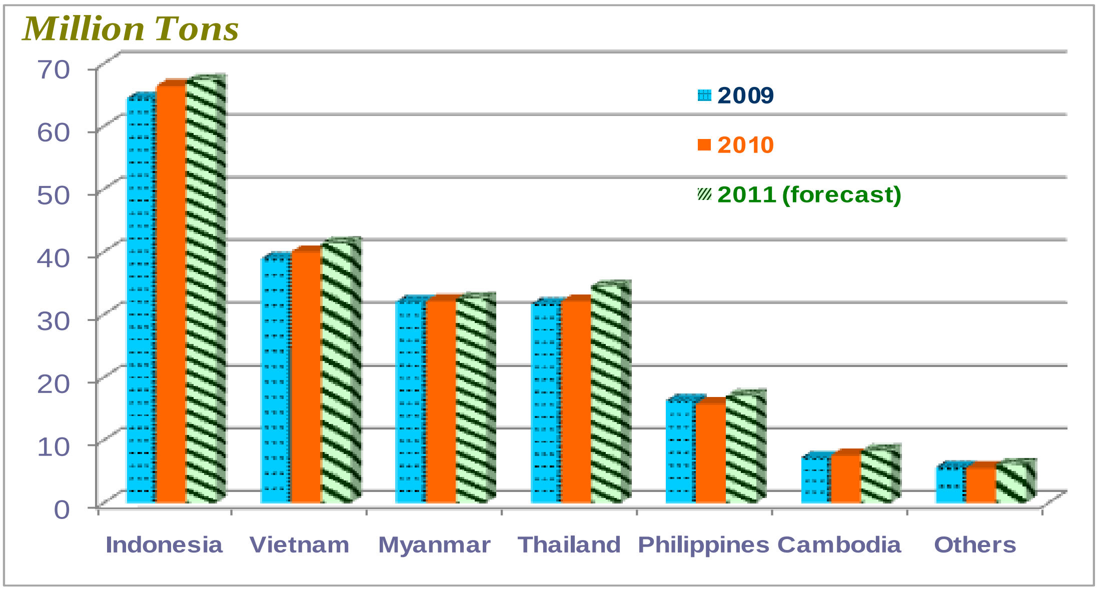


Figure 1 Paddy production of selected countries in ASEAN, 2009-2011

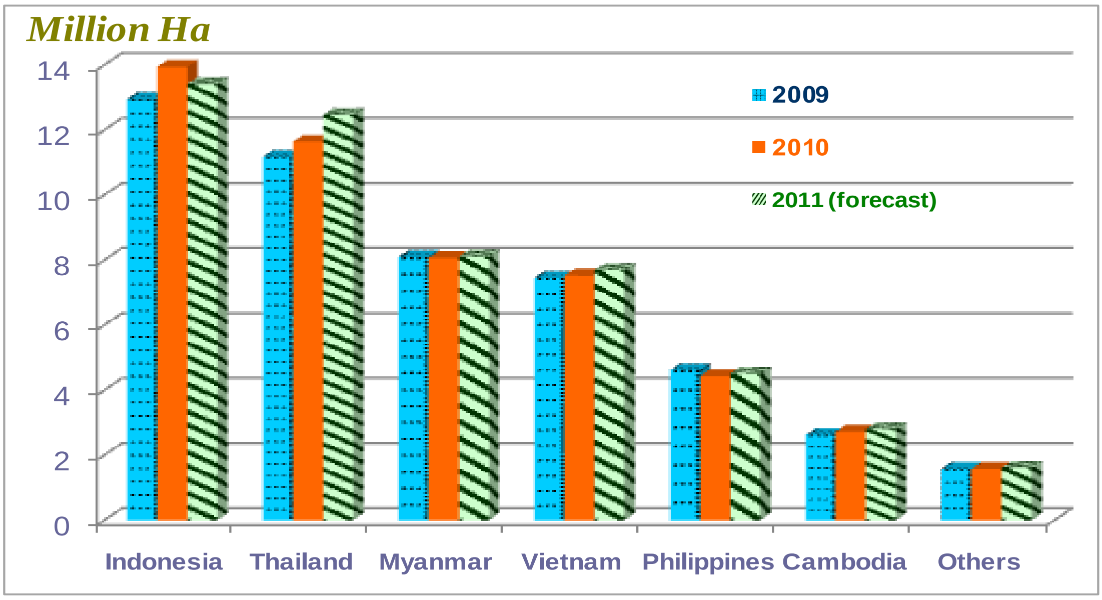


Figure 2 Paddy planted area of selected countries in ASEAN, 2009-2011

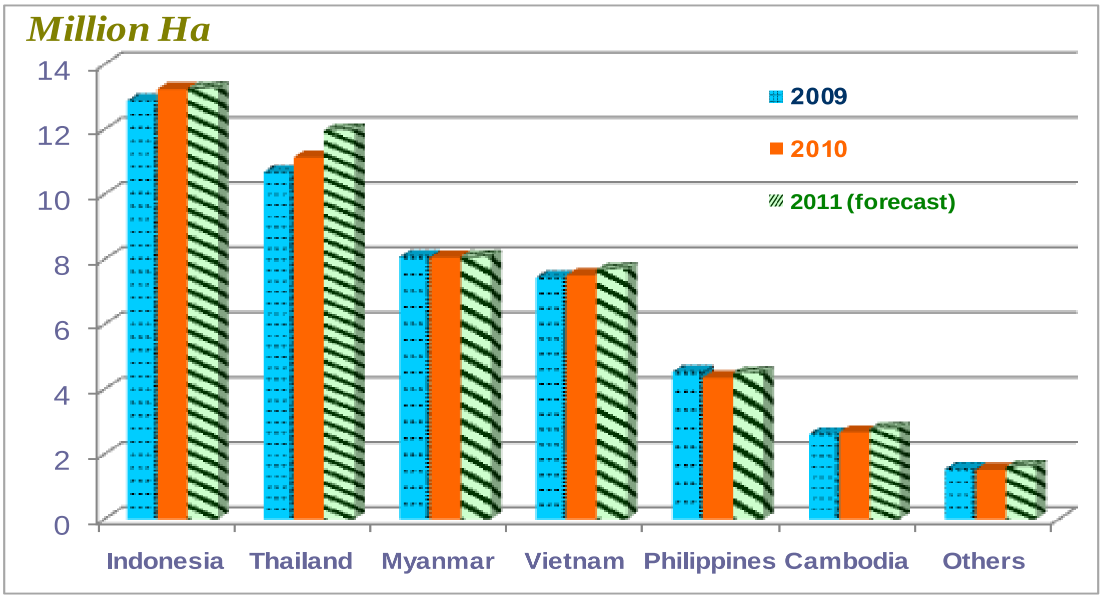


Figure 3 Paddy harvested area of selected countries in ASEAN, 2009-2011

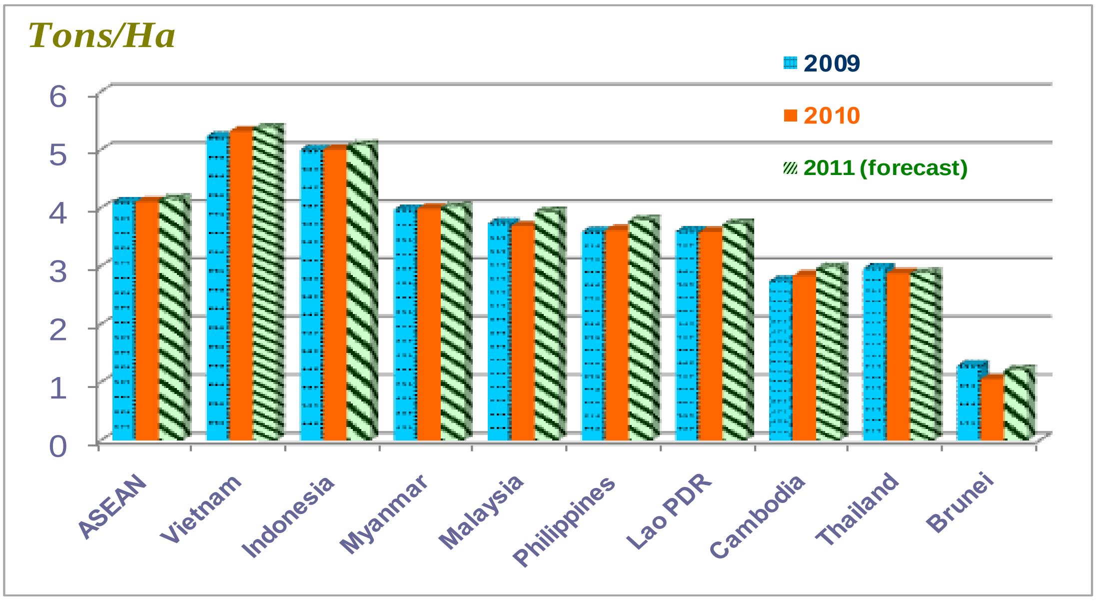


Figure 4 Paddy yield of countries in ASEAN, 2009-2011

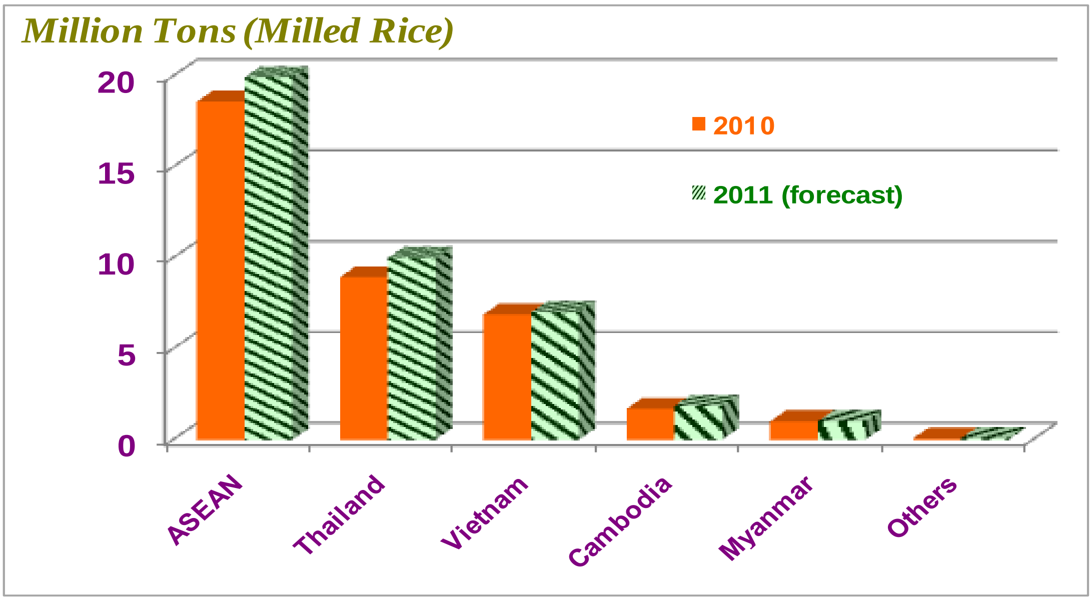


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2010-2011

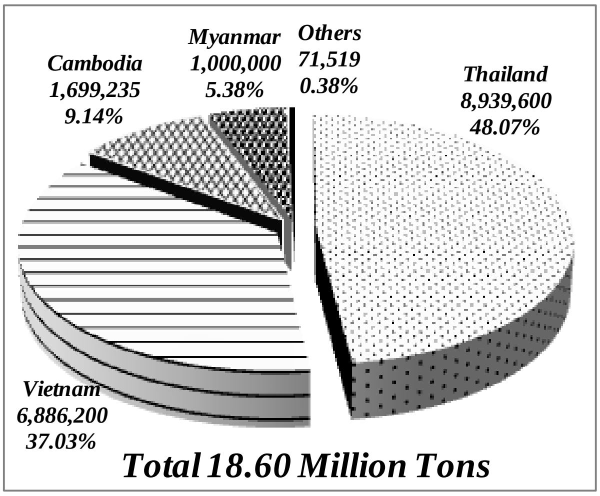


Figure 6 Share of rice export (tons) among ASEAN countries, 2010

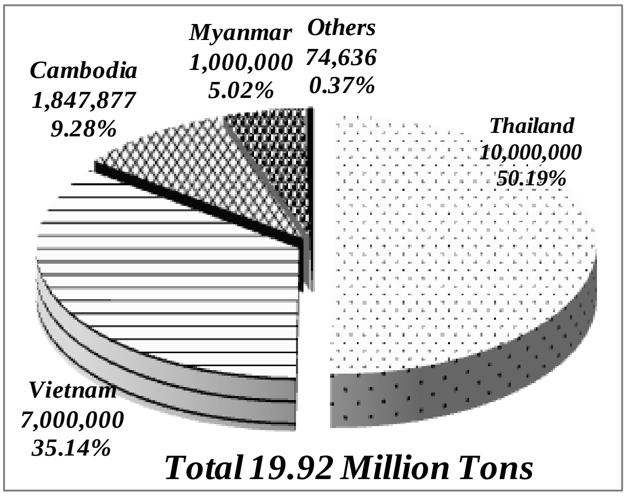


Figure 7 Share of rice export (tons) among ASEAN countries, 2011

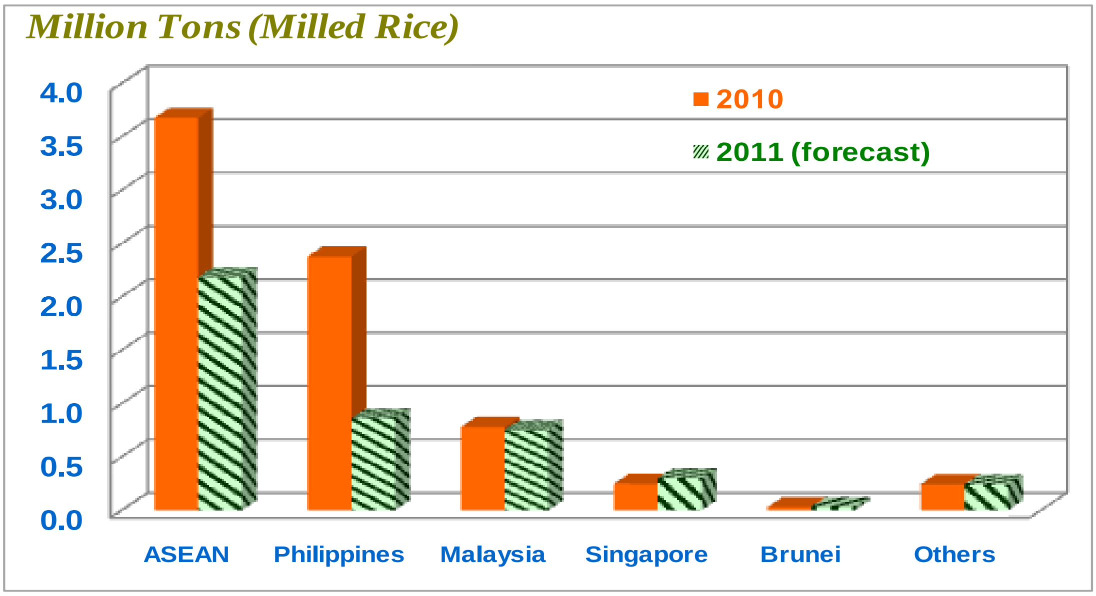


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2010-2011

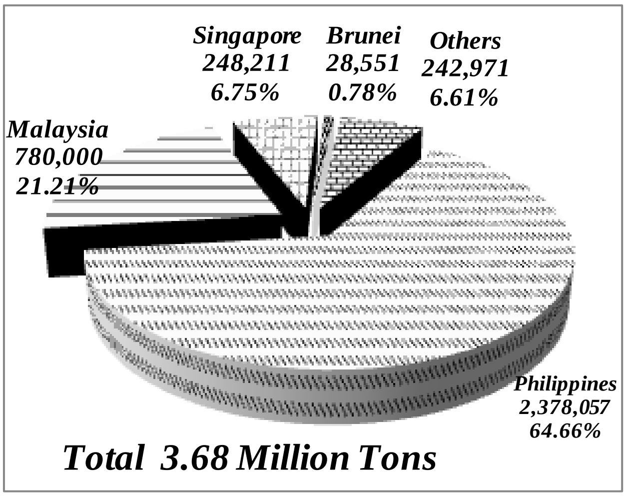


Figure 9 Share of rice import (tons) among ASEAN countries, 2010

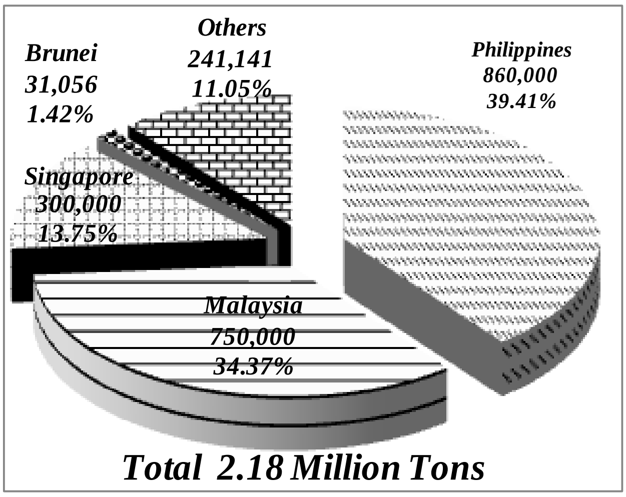


Figure 10 Share of rice import (tons) among ASEAN countries, 2011

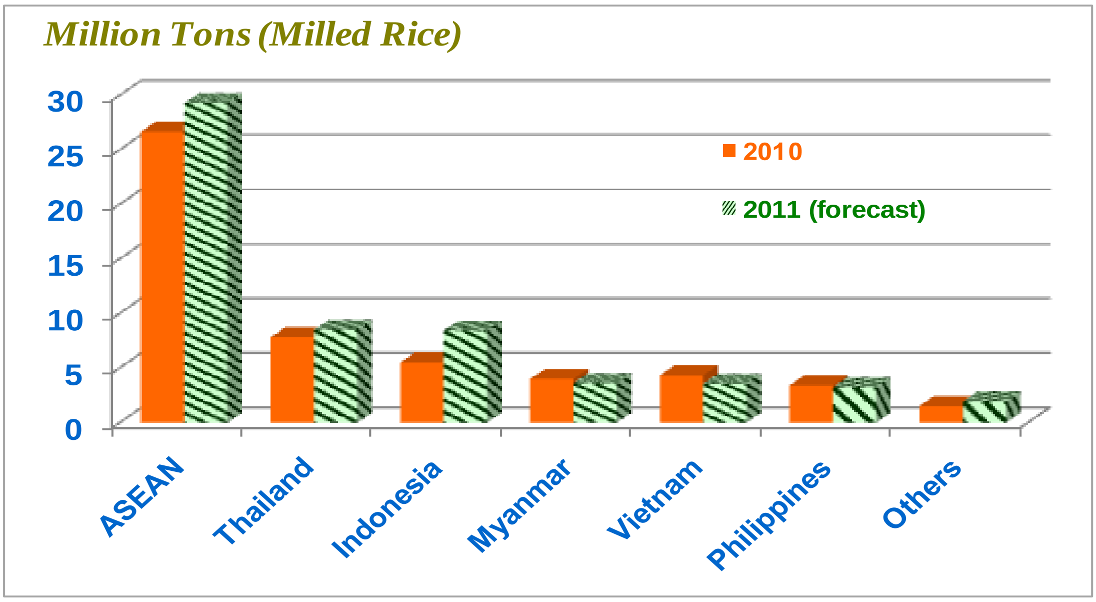


Figure 11 Amount of ending stock of rice in ASEAN countries

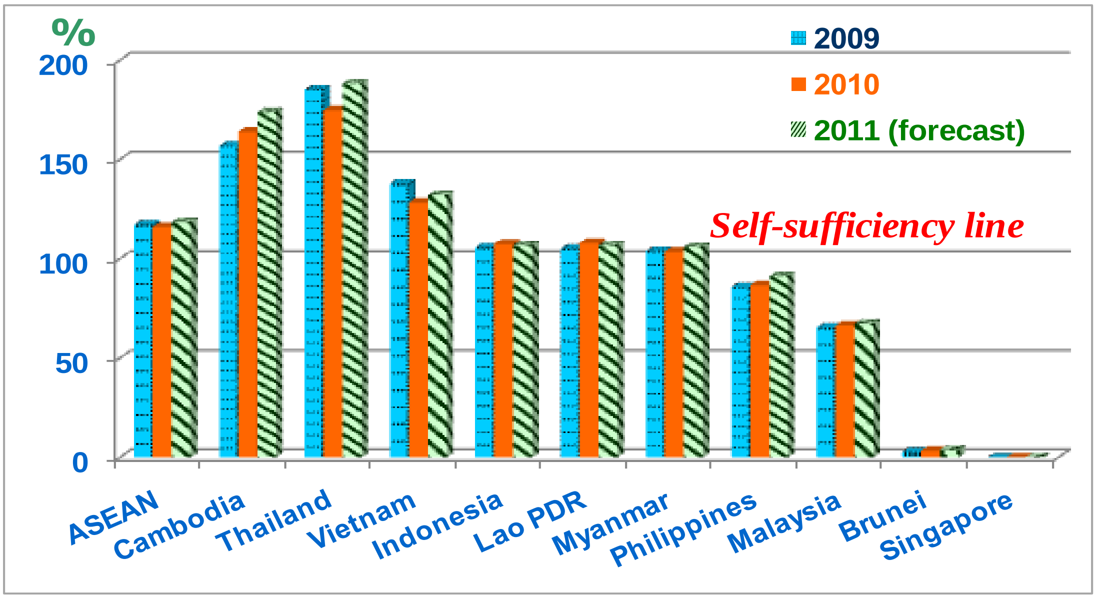


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2009-2011

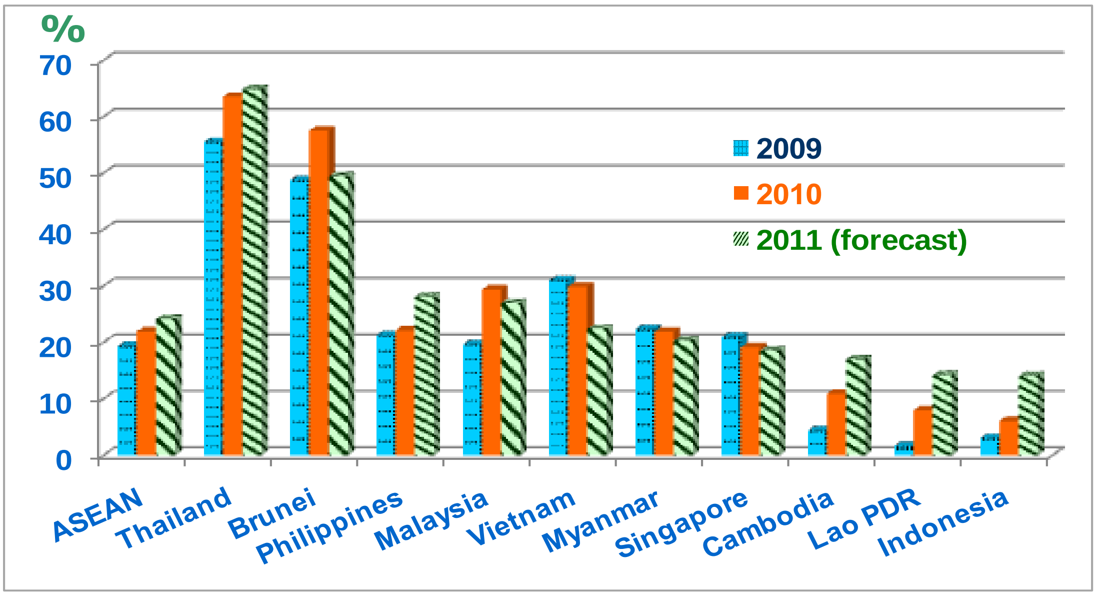


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2009-2011

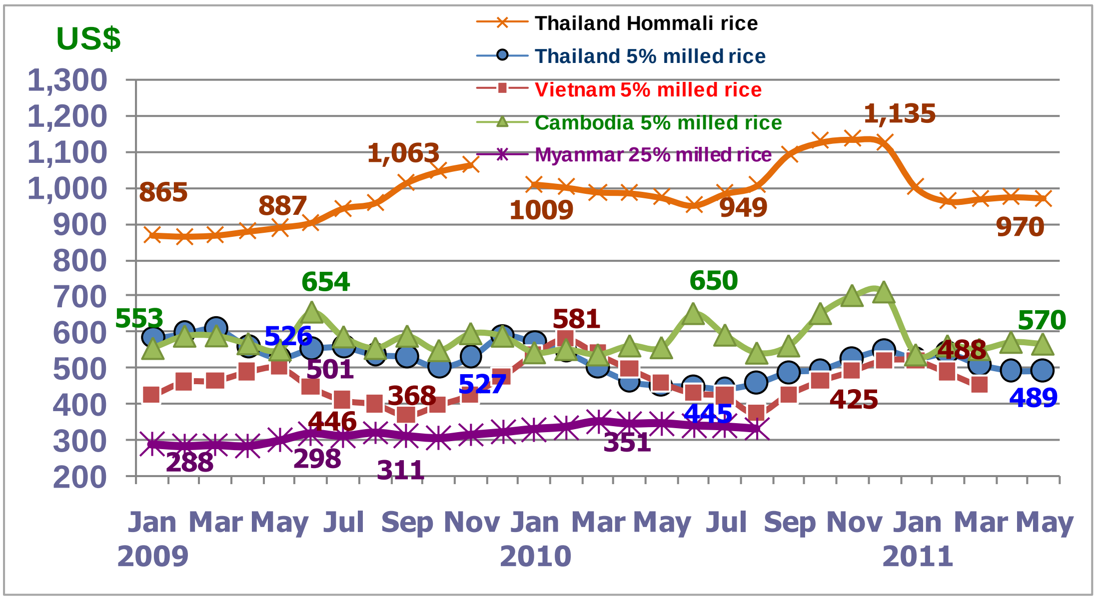


Figure 14 FOB price (US$) of milled rice of selected countries in ASEAN in 2009-2011

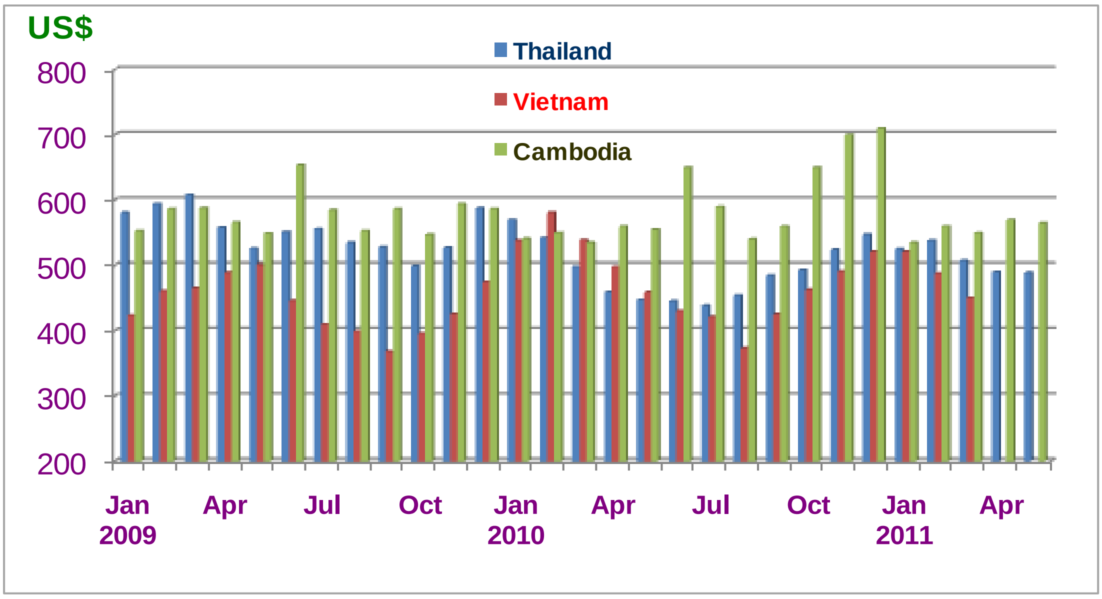


Figure 15 FOB price (US$) of milled rice of selected countries in ASEAN in 2009-2011

Highlights of Maize Outlook

- Maize supply in ASEAN is forecast to increase about 8.59 percent from 46.89 million tons in 2010 (crop year 2009/10) to 50.92 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 36.90 million tons in 2010 to 37.48 million tons in 2011 which is about 1.57 percent due to the increase in the yield. The average yield is forecast to increase about 1.87 percent.
- The maize export from ASEAN is expected to increase by about 32.38 percent, from 1.05 million tons to 1.39 million tons. The import is predicted to increase from 6.45 million tons to 6.90 million tons during the same period.
- The beginning stock is estimated to increase considerably from 3.53 million tons in 2010 to 6.54 million tons which is about 85.27 percent while the ending stock is forecast to increase from 6.54 million tons to 7.69 million tons, an increase of about 17.58 percent during the same period.
- The ratio of production to domestic utilization (self-sufficiency ratio) is forecast to reduce from 93.90 percent in 2010 to 89.58 percent in 2011. The ratio of beginning stock to domestic utilization (food security ratio) is forecast to increase from 8.98 percent in 2010 to 15.63 percent.

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

Items	2010	2011	Change	
			Quantity	%
Supply (Million tons)	46.89	50.92	4.03	8.59
Beginning stock	3.53	6.54	3.01	85.27
Production	36.90	37.48	0.58	1.57
Import	6.45	6.90	0.45	6.98
Demand (Million tons)	46.89	50.92	4.03	8.59
Domestic utilization	39.30	41.84	2.54	6.46
Export	1.05	1.39	0.34	32.38
Ending stock	6.54	7.69	1.15	17.58
Ratio of production to domestic utilization (%)	93.90	89.58	-4.32	-4.60
Ratio of beginning stock to domestic utilization (%)	8.98	15.63	6.65	74.05

ASEAN Maize Situation in 2010

Production

Maize production in ASEAN in 2010 (crop year 2009/10) was estimated at 36.90 million tons, rise 236,280 tons, an increase of 0.64 percent from 36.67 million tons in 2009 (Table 14, Figure 16). The increase in production was solely due to the increase in yield while the area was slightly decreased. The major decrease in area has occurred most in the Philippines and Indonesia. Indonesia ranked first in terms of maize production which produced about half of the total production in ASEAN. The Philippines, Thailand and Vietnam ranked second, third and forth 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 has increased slightly due to higher maize prices and lower prices of competing crops, the planted area of the second (major) crop has 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 solely due to the increase in yield while the area has decreased. 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 both planted area and yield. The increase in planted area, however, was found only in the second crop which dominated the reduction of the planted area of the first crop. The increase in yield of the second crop was a result of the favorable weather. The decrease in area of the first crop 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**, the production has increased because of the expansion of area as a result of the rise in price of maize. However the average yield has decreased a little due to the drought and flood.

For **Vietnam**, the increase in production was due to the increase in both area and yield. The increase in the area was the impact of the increase in maize price and the government policy which encouraged farmers to grow maize while the increase in yield was because of the farmers used more improved variety.

Utilization and Stock

The domestic utilization of maize in ASEAN in 2010 (calendar year) was estimated at 39.30 million tons while the production was estimated at 36.90 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 93.42 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 6.54 million tons (Table 19). Indonesia carried most of the stock in the region and followed by Thailand, Myanmar and Vietnam respectively.

The ratio of maize stock to domestic utilization (food security ratio) in the ASEAN was estimated at 8.98 percent which is higher than 7.77 percent in 2009. Every country has stock lower than 20 percent except Myanmar which has the ratio equal to 42.41%. (Table 22, Figure 28).

Trade

In 2010, ASEAN altogether exported about 1.05 million tons while imported about 6.45 million tons of maize (Table 19, Figure 21 and 24). Cambodia and Thailand were the two major exporting countries in ASEAN while Malaysia Indonesia and Vietnam were the three 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.

Prices

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 prices of Thailand, which was higher than the 2009 price.

Damaged Area

The maize damaged area in 2010 for the whole ASEAN was about 138,880 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 37.48 million tons, up from 36.90 million tons in 2010, an increase of 0.58 million tons which is about 1.58 percent (Table 14, Figure 16). An increase in production is expected in all countries in the region except Indonesia and Thailand. The major contribution to the increase in production is the Philippines. The increase in production in most countries is due to the increase in both area and yield except Thailand where area is expected to decrease while yield is expected to increase. For Indonesia and Lao PDR 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 6.46 percent from 39.30 million tons in 2010 to 41.84 million tons in 2011 (Table 19 and 20). The ratio of production to domestic utilization (self-sufficiency ratio) is expected to decrease from 93.90 percent to 89.58 percent, compared with previous year (Table 21, Figure 27). The ratio of beginning stock to domestic utilization (food security ratio) is forecast to increase from 8.98 percent in 2010 to 15.63 percent in 2011(Table 22, Figure 28). For the Philippines, Malaysia, Vietnam and Indonesia, the food security ratio is forecast to range from 2.15 in the Philippines to 18.96 percent in Indonesia.

Trade

The 2011 maize export from ASEAN is forecast to be 1.39 million tons up from 1.05 million tons in previous year (Table 19 and 20, Figure 20 and 22). The maize import by ASEAN countries is forecast to be about 6.90 million tons, up from 6.45 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 Indonesia 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	**36,665.51**	**36,901.79**	**236.28**	**0.64**	**37,484.33**	**582.54**	**1.58**
Brunei	-	-	-	-	-	-	-
Cambodia	924.03	773.27	-150.76	-16.32	912.50	139.23	18.01
Indonesia	17,629.75	18,364.43	734.68	4.17	17,925.47	-438.96	-2.39
Lao PDR	848.77	914.98	66.21	7.80	1,004.50	89.52	9.78
Malaysia	-	-	-	-	-	-	-
Myanmar	1,184.95	1,225.89	40.93	3.45	1,344.83	118.94	9.70
Philippines	7,034.03	6,376.80	-657.24	-9.34	7,001.03	624.23	9.79
Singapore	-	-	-	-	-	-	-
Thailand	4,612.18	4,639.63	27.45	0.60	4,603.01	-36.63	-0.79
Vietnam	4,431.80	4,606.80	175.00	3.95	4,693.00	86.20	1.87

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	**9,933.85**	**9,790.14**	**-143.71**	**-1.45**	**9,738.35**	**-51.79**	**-0.53**
Brunei	-	-	-	-	-	-	-
Cambodia	221.29	213.62	-7.66	-3.46	235.00	21.38	10.01
Indonesia	4,258.52	4,171.90	-86.63	-2.03	4,134.46	-37.43	-0.90
Lao PDR	175.97	184.91	8.94	5.08	205.00	20.10	10.87
Malaysia	-	-	-	-	-	-	-
Myanmar	355.14	362.81	7.67	2.16	389.40	26.59	7.33
Philippines	2,701.09	2,580.09	-121.00	-4.48	2,528.13	-51.96	-2.01
Singapore	-	-	-	-	-	-	-
Thailand	1,135.05	1,149.92	14.88	1.31	1,114.36	-35.57	-3.09
Vietnam	1,086.80	1,126.90	40.10	3.69	1,132.00	5.10	0.45

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	**9,778.98**	**9,651.26**	**-127.72**	**-1.31**	**9,646.74**	**-4.52**	**-0.05**
Brunei	-	-	-	-	-	-	-
Cambodia	212.96	189.53	-23.43	-11.00	215.00	25.47	13.44
Indonesia	4,160.66	4,143.25	-17.41	-0.42	4,068.78	-74.47	-1.80
Lao PDR	175.97	184.91	8.94	5.08	205.00	20.10	10.87
Malaysia	-	-	-	-	-	-	-
Myanmar	354.74	362.81	8.07	2.27	389.03	26.23	7.23
Philippines	2,683.89	2,499.04	-184.85	-6.89	2,526.78	27.74	1.11
Singapore	-	-	-	-	-	-	-
Thailand	1,103.96	1,144.84	40.88	3.70	1,110.15	-34.69	-3.03
Vietnam	1,086.80	1,126.90	40.10	3.69	1,132.00	5.10	0.45

Table 17 Maize Yield in ASEAN countries, 2009-2011

Unit: Ton/Hectare

Country	2009 (2008/09)	2010 (2009/10)	change *2010 over 2009*		2011 (2010/11)	change *2011 over 2010*	
			Quantities	(%)		Quantities	(%)
ASEAN	**3.75**	**3.82**	**0.07**	**1.87**	**3.89**	**0.07**	**1.83**
Brunei	-	-	-	-	-	-	-
Cambodia	4.34	4.08	-0.26	-5.99	4.24	0.16	3.92
Indonesia	4.24	4.43	0.19	4.48	4.41	-0.02	-0.45
Lao PDR	4.82	4.95	0.13	2.70	4.90	-0.05	-1.01
Malaysia	-	-	-	-	-	-	-
Myanmar	3.34	3.38	0.04	1.20	3.46	0.08	2.37
Philippines	2.62	2.55	-0.07	-2.67	2.77	0.22	8.63
Singapore	-	-	-	-	-	-	-
Thailand	4.18	4.05	-0.13	-3.11	4.15	0.10	2.47
Vietnam	4.08	4.09	0.01	0.25	4.15	0.06	1.47

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

Unit: Hectare

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	unspecified	Others	Total
ASEAN	**13,977**	**121,004**	**112**	**0**	**3,787**	**0**	**138,880**
Brunei	-	-	-	-	-	-	-
Cambodia	-	24,095	-	-	-	-	24,095
Indonesia	10,058	14,692	112	-	3,787	-	28,649
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.

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	**3,529,312**	**36,901,794**	**6,454,750**	**46,885,856**	**39,297,300**	**1,048,817**	**6,539,739**	**46,885,856**
Brunei	n.a.	-	3,076	3,076	3,076	0	n.a.	3,076
Cambodia	27,919	773,269	0	801,188	162,386	595,417	43,385	801,188
Indonesia	1,590,688	18,364,430	1,786,770	21,741,888	18,123,987	44,514	3,573,387	21,741,888
Lao PDR	n.a.	914,980	n.a.	914,980	914,980	n.a.	n.a.	914,980
Malaysia	308,000	-	3,015,918	3,323,918	3,001,848	5,070	317,000	3,323,918
Myanmar	324,693	1,225,885	-	1,550,578	765,553	10,400	774,625	1,550,578
Philippines	254,400	6,376,796	88,470	6,719,666	6,567,140	26	152,500	6,719,666
Singapore	-	-	13,769	13,769	13,698	71	0	13,769
Thailand	810,277	4,639,634	366,747	5,816,658	4,280,000	393,319	1,143,339	5,816,658
Vietnam	213,335	4,606,800	1,180,000	6,000,135	5,464,632	0	535,503	6,000,135

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	**6,539,739**	**37,484,330**	**6,897,345**	**50,921,414**	**41,842,206**	**1,385,085**	**7,694,123**	**50,921,414**
Brunei	n.a.	-	1,206	1,206	1,206	0	n.a.	1,206
Cambodia	43,385	912,500	0	955,885	191,526	735,349	29,010	955,885
Indonesia	3,573,387	17,925,467	1,786,770	23,285,624	18,851,448	44,514	4,389,662	23,285,624
Lao PDR	n.a.	1,004,500	n.a	1,004,500	1,004,500	-	n.a.	1,004,500
Malaysia	317,000	-	3,792,369	4,109,369	3,777,954	5,222	326,193	4,109,369
Myanmar	774,625	1,344,826	-	2,119,451	829,793	100,000	1,189,658	2,119,451
Philippines	152,500	7,001,028	-	7,153,528	7,083,959	-	69,569	7,153,528
Singapore	-	-	17,000	17,000	17,000	0	0	17,000
Thailand	1,143,339	4,603,009	300,000	6,046,348	4,360,000	500,000	1,186,348	6,046,348
Vietnam	535,503	4,693,000	1,000,000	6,228,503	5,724,820	0	503,683	6,228,503

Note: n.a. = not available, nil = very small amount and the value of 2011 is forecasting value

Table 21 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2009-2011

Unit : Ton

Country	2009			2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**36,849,975**	**38,617,368**	**95.42**	**36,901,794**	**39,297,300**	**93.90**	**37,484,330**	**41,842,206**	**89.58**
Brunei	-	-	-	-	3,076	-	-	1,206	-
Cambodia	924,026	194,046	476.19	773,269	162,386	476.19	912,500	191,526	476.44
Indonesia	17,592,309	17,657,060	99.63	18,364,430	18,123,987	101.33	17,925,467	18,851,448	95.09
Lao PDR	1,083,465	905,727	119.62	914,980	914,980	100.00	1,004,500	1,004,500	100.00
Malaysia	0	2,667,839	-	-	3,001,848	-	-	3,777,954	-
Myanmar	1,184,950	740,057	160.12	1,225,885	765,553	160.13	1,344,826	829,793	162.07
Philippines	7,034,033	7,279,804	96.62	6,376,796	6,567,140	97.10	7,001,028	7,083,959	98.83
Singapore	-	18,205	-	-	13,698	-	-	17,000	-
Thailand	4,599,392	3,824,726	120.25	4,639,634	4,280,000	108.40	4,603,009	4,360,000	105.57
Vietnam	4,431,800	5,329,904	83.15	4,606,800	5,464,632	84.30	4,693,000	5,724,820	81.98

Table 22 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2009-2011

Unit : Ton

Country	2009			2010			2011		
	Production	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**2,999,213**	**38,617,368**	**7.77**	**3,529,312**	**39,297,300**	**8.98**	**6,539,739**	**41,842,206**	**15.63**
Brunei	-	-	-	n.a.	3,076	-	n.a.	1,206	-
Cambodia	27,919	194,046	14.39	27,919	162,386	17.19	43,385	191,526	22.65
Indonesia	1,354,485	17,657,060	7.67	1,590,688	18,123,987	8.78	3,573,387	18,851,448	18.96
Lao PDR	n.a.	905,727	-	n.a.	914,980	-	n.a.	1,004,500	-
Malaysia	287,000	2,667,839	10.76	308,000	3,001,848	10.26	317,000	3,777,954	8.39
Myanmar	n.a.	740,057	-	324,693	765,553	42.41	774,625	829,793	93.35
Philippines	197,600	7,279,804	2.71	254,400	6,567,140	3.87	152,500	7,083,959	2.15
Singapore	-	18,205	-	-	13,698	-	-	17,000	-
Thailand	920,940	3,824,726	24.08	810,277	4,280,000	18.93	1,143,339	4,360,000	26.22
Vietnam	211,269	5,329,904	3.96	213,335	5,464,632	3.90	535,503	5,724,820	9.35

Note: n.a. = not available, nil = very small amount and the value of 2011 is forecasting value

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	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
	2011	210	240	235	250	260								239
Myanmar	2009	194	197	239	198	176	194	212	182	210	206	280	235	210
	2010	213	193	181	187	208	196		352					219
Thailand	2009	217	213	221	221	215	226	191	190	189	195	222	242	212
	2010	255	260	273	308	296	303	319	290	309	323	315	314	297
	2011	317	322	333	361									333

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	210	193	193	198	207	222	227	257	217	227	212	214	215
	2010	243	242	245	249	247	240	245	249	247	252	263	272	250
	2011	279	303											291
Philippines In-quota	2009	-	408	212	242	-	392	243	-	-	-	-	-	299
	2010	-	-	-	-	-	502	362	n.a.	n.a.	n.a.	n.a.	469	444
	2011	n.a.	n.a.	n.a.	n.a.									
Out-quota	2009	-	206	300	165	256	265	525	297	395	248	-	-	295
	2010	244	225	320	384	-	288	274	234	342	268	427	627	330
	2011	n.a.	n.a.	n.a.	n.a.									
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	273	305	272
	2011	279	292	329	340									310

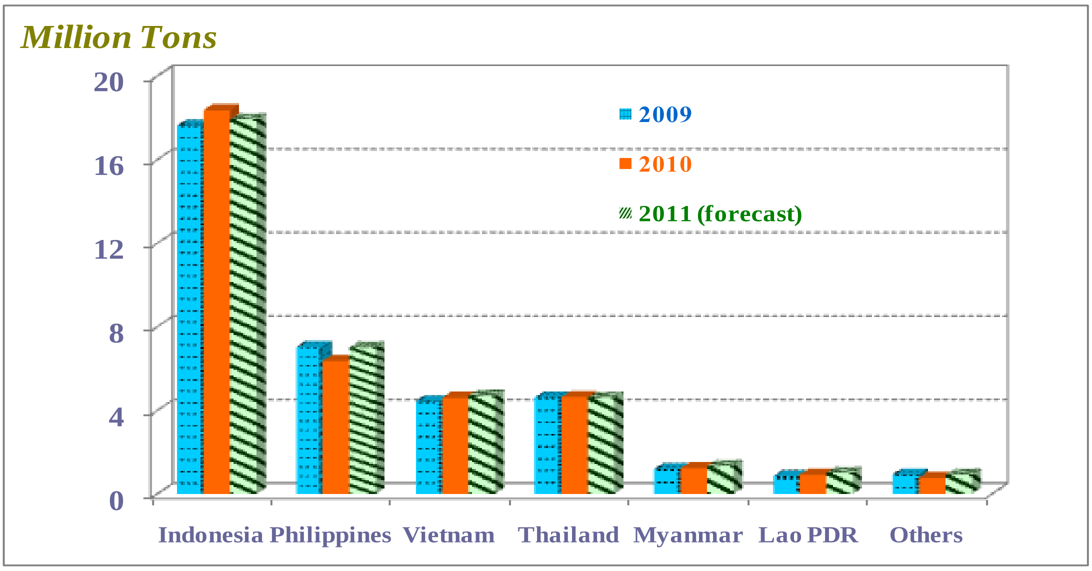


Figure 16 Maize production of selected countries in ASEAN, 2009-2011

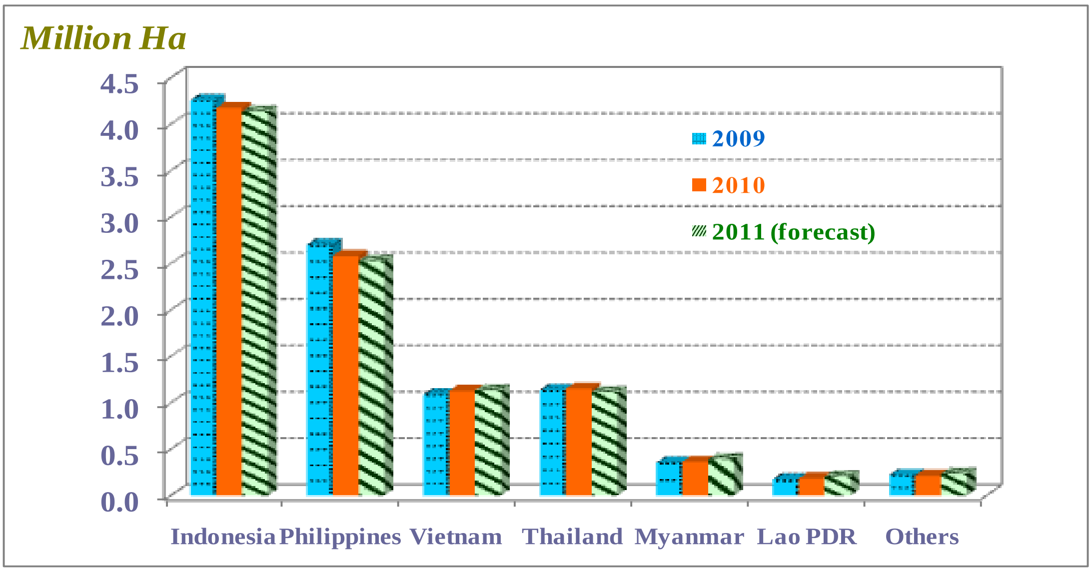


Figure 17 Maize planted area of selected countries in ASEAN, 2009-2011

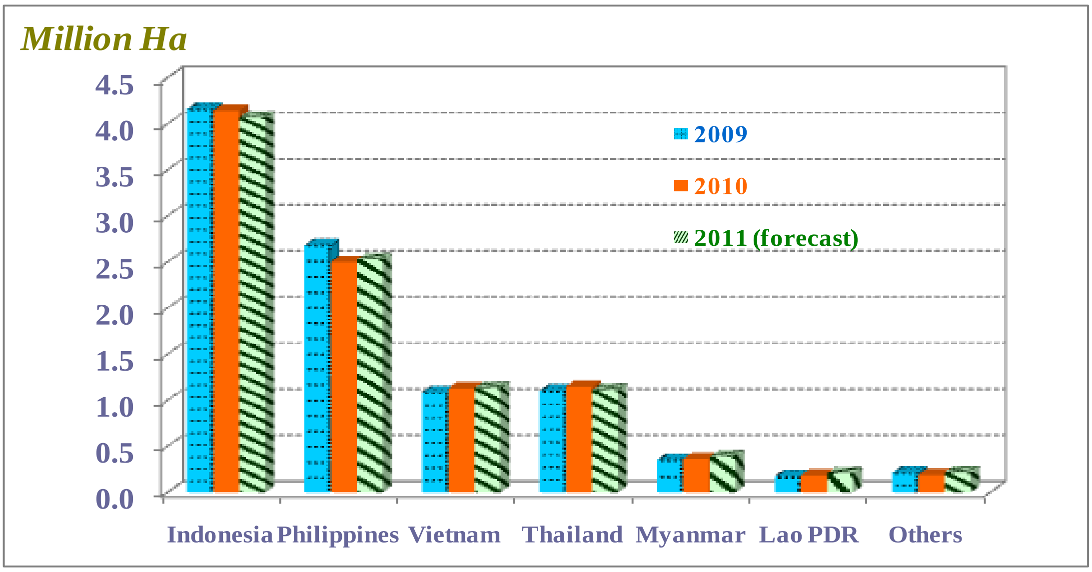


Figure 18 Maize harvested area of selected countries in ASEAN, 2009-2011

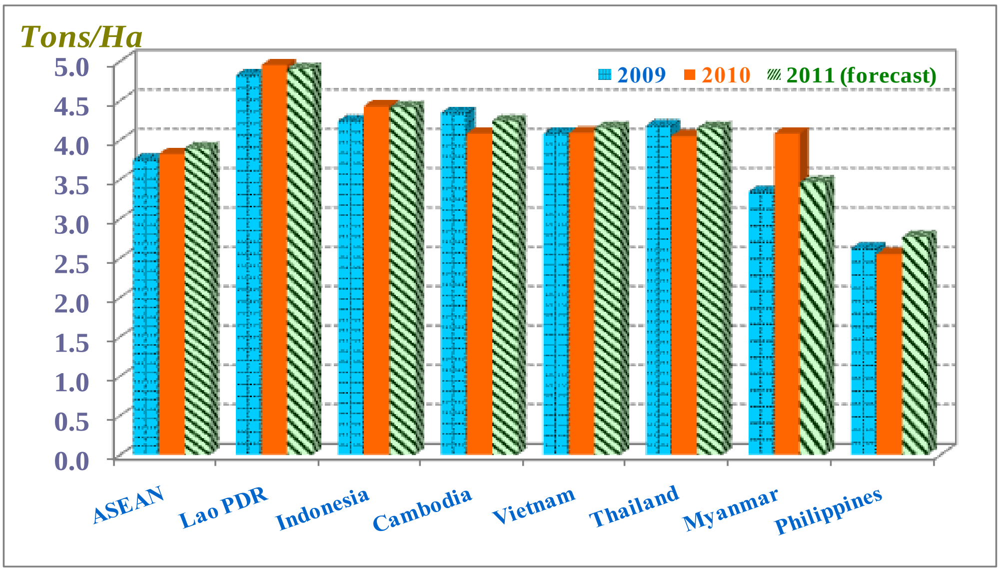


Figure 19 Maize yield of countries in ASEAN, 2009-2011

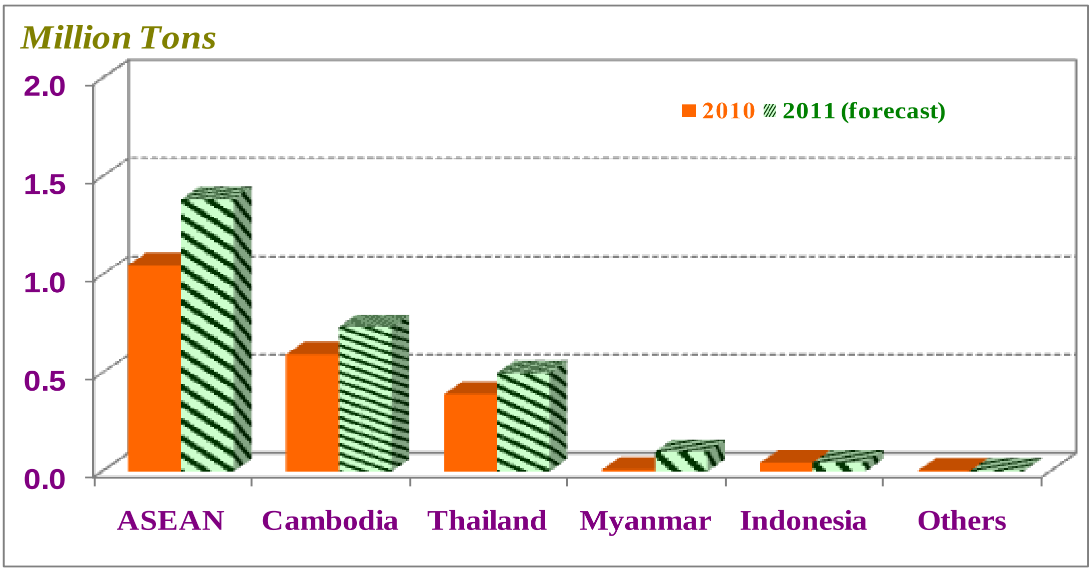


Figure 20 Amount of maize export (million tons) of selected countries in ASEAN In 2010-2011

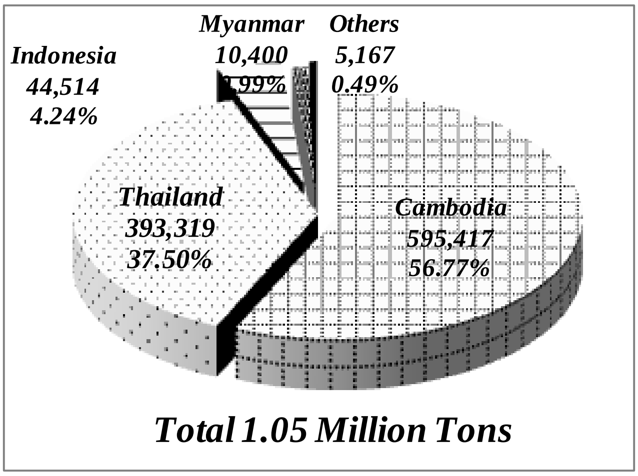


Figure 21 Share of maize export (ton) among ASEAN countries, 2010

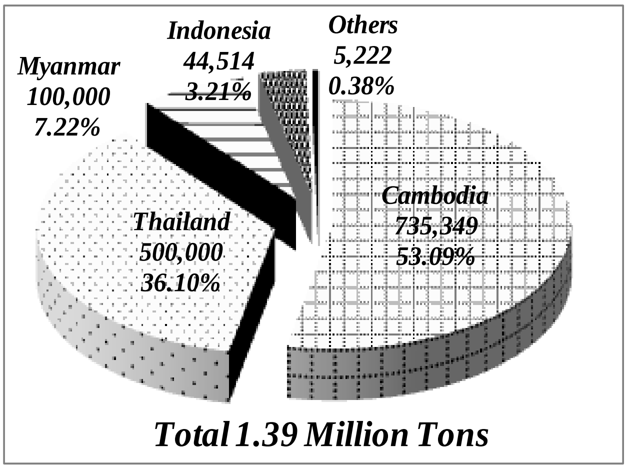


Figure 22 Share of maize export (ton) among ASEAN countries, 2011

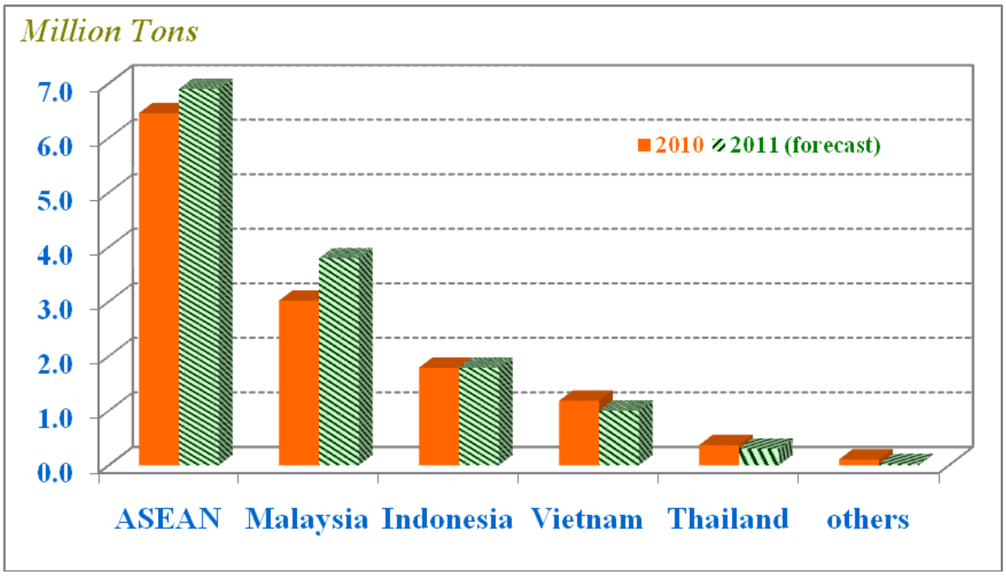


Figure 23 Amount of maize import (million tons) by selected countries in ASEAN in 2010-2011

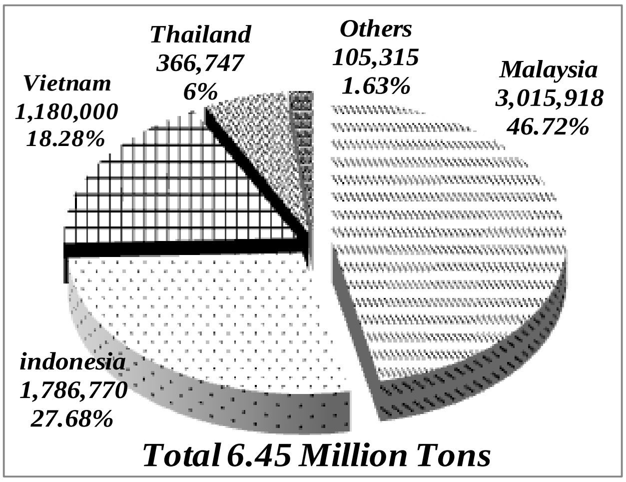


Figure 24 Share of maize import (tons) among ASEAN countries, 2010

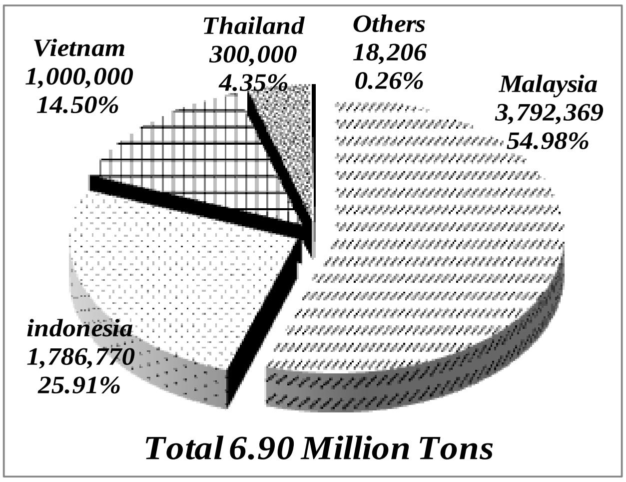


Figure 25 Share of maize import (tons) among ASEAN countries, 2011

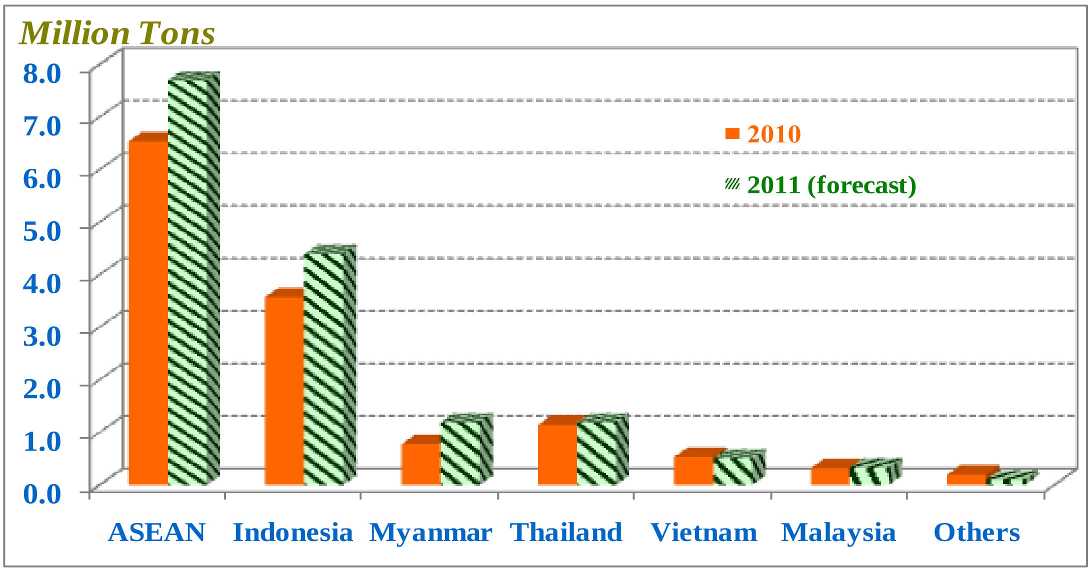


Figure 26 Amount of ending stock of maize in ASEAN countries

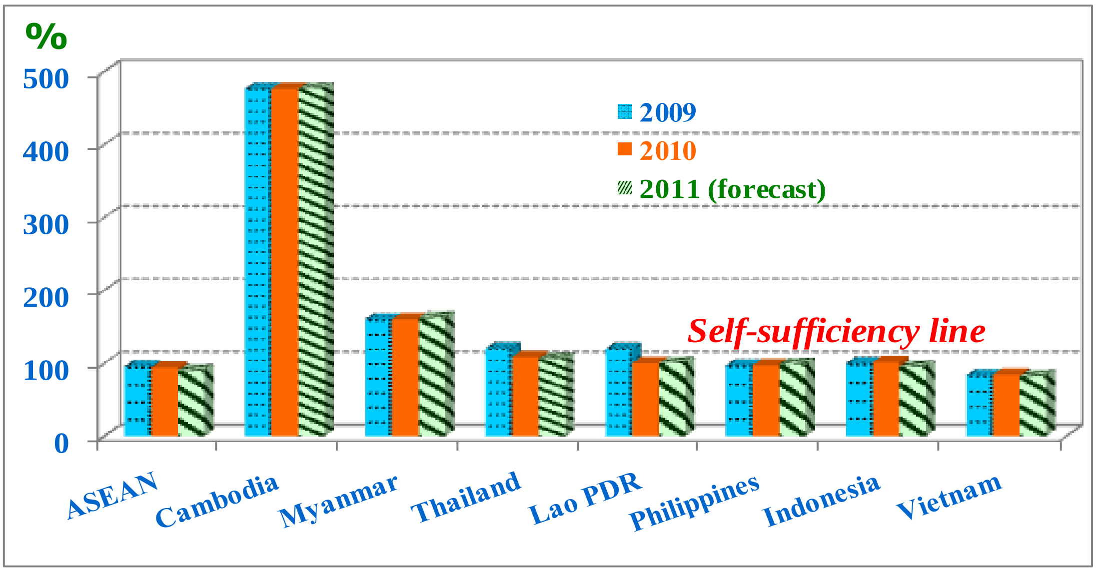


Figure 27 Ratio of maize production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2009-2011

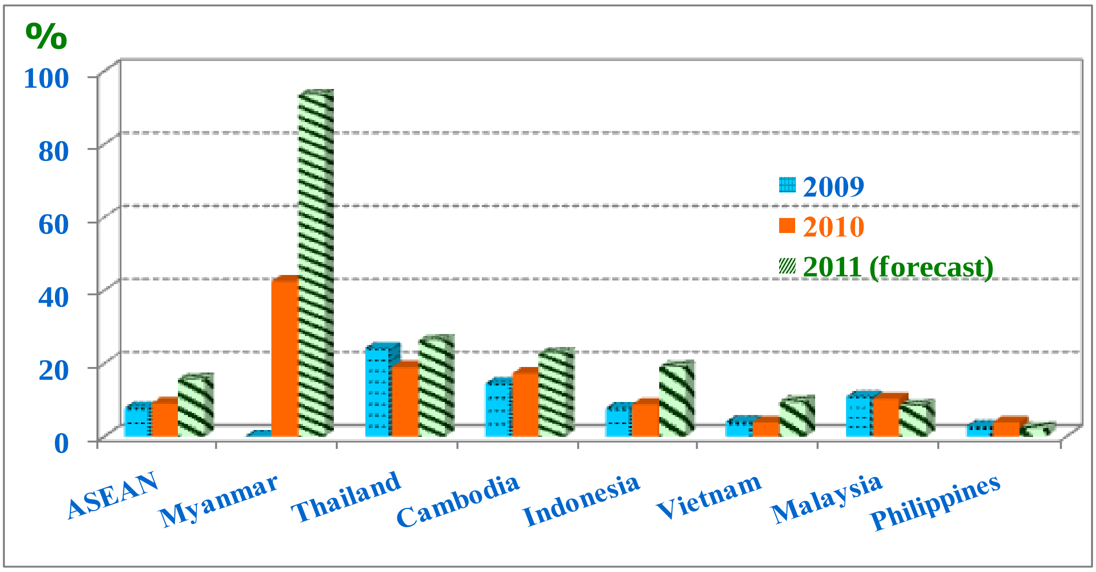


Figure 28 Ratio of maize beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2009-2011

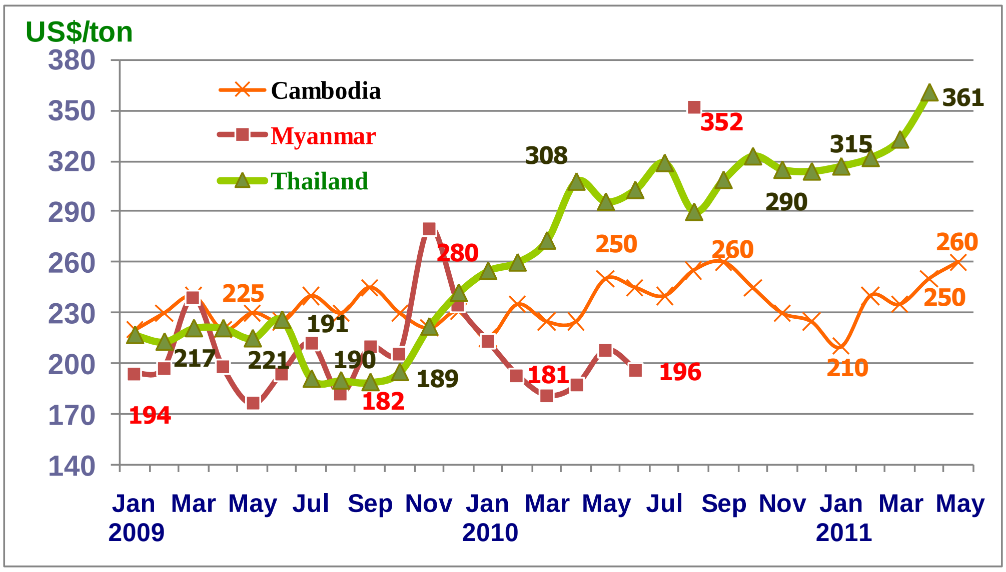


Figure 29 FOB price (US$) of maize of selected countries in ASEAN in 2009-2011

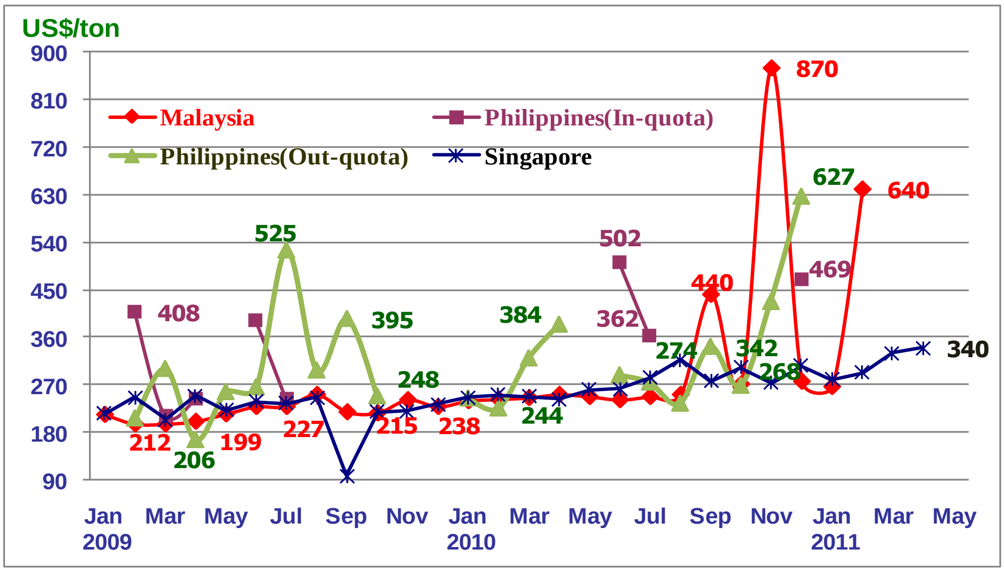


Figure 30 CIF price (US$) of maize of selected countries in ASEAN in 2009-2011

Highlights of Sugar Outlook

- ASEAN sugar supply in 2011 is forecast to be 25.24 million tons, up from 20.89 million tons in 2010 which is about 20.82 percent due to the increase in production and beginning stock.
- The sugar production is forecast to increase about 23.87 percent from 13.91 million tons in 2010 to 17.23 million tons in 2011.
- The beginning stock of sugar in 2011 is forecast to be 4.08 million tons, compared with 3.02 million tons in 2010, an increase of 1.06 million tons or 35.10 percent.
- The import is expected to be about 3.93 million tons, compared with 3.97 million tons in 2010, a decrease of 0.04 million tons or 1.01 percent.
- For export, it is forecast to be 7.59 million tons, compared with 5.21 million tons in 2010, an increase of 2.38 million tons or 45.68 percent.
- The ratio of production to domestic utilization (self-sufficiency ratio) for 2011 is forecast to be 138.78 percent, up from 112.34 percent in 2010. This ratio is 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 32.87 percent as compared with 24.35 percent in 2010.

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

Items	2010	2011	Change	
			Quantity	%
Supply (Million tons)	20.89	25.24	4.35	20.82
Beginning stock	3.02	4.08	1.06	35.10
Production	13.91	17.23	3.32	23.87
Import	3.97	3.93	-0.04	-1.01
Demand (Million tons)	21.71	25.24	3.53	16.26
Domestic utilization	12.38	12.41	0.03	0.24
Export	5.21	7.59	2.38	45.68
Ending stock	4.08	5.20	1.12	27.45
Ratio of production to domestic utilization (%)	112.34	138.78	26.44	23.54
Ratio of beginning stock to domestic utilization (%)	24.35	32.87	8.52	34.99

ASEAN Sugar Situation in 2010

Production

The sugarcane production in ASEAN in 2010 (crop year 2009/10) was estimated at 132.03 million tons, which was 1.51 percent or 2.02 million tons lower than 134.05 million tons recorded last year. The decrease in production was mainly due to the reduction in yield. The planted area has increased in most countries except the Philippines and Myanmar. 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 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 58.53 tons per hectare in 2010, down from 59.55 tons per hectare in 2009. The decrease in yield has occurred in Cambodia, Indonesia, the Philippines and Thailand.

In **Cambodia**, the increase in production was due solely to the increase in the area. The expansion of the planted area derived from the farmers responded to the increase in price of sugarcane and the decrease in price of the competing crops as well as the favorable weather. The decrease in the yield was due to the drought.

In **Indonesia**, the increase in production due to the increase in planted area and harvested area. The increase in area planted as resulted of the increasing of price, government policy and the favorable weather. Since the decrease of yield was a result of the decline of rendement due to the 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 long dry spell.

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 the positive price response of the farmers.

Utilization and Stock

The domestic utilization of sugar in ASEAN in 2010 (calendar year) was estimated at 12.38 million tons. The beginning stock of sugar in 2010 was estimated at 3.02 million tons. The ending stock was estimated at 4.08 million tons. Thailand, the Philippines and Indonesia carried the most stock. These three countries together have stock about 85.57 percent of the total stock in ASEAN (Table 31, Figure 41). The ratio of production to domestic utilization (self sufficiency ratio) for 2010 was 112.34 percent (Table 33, Figure 42). This implied that ASEAN as a whole produced sugar 12.34 percent more than utilization within the region. On the country by country basis, for producing countries, the Philippines and Indonesia did not produce enough for their own consumption. For Brunei, Malaysia and Singapore all the domestic consumption relied on imports.

Trade

In 2010, ASEAN as a whole exported about 5.21 million tons of sugar. Thailand exported about 4.66 million tons which was about 89 percent of the total export from ASEAN (Table 31, Figure 35-36).

For the import, ASEAN imported about 3.97 million tons of sugar in 2010. Malaysia and Indonesia are two major importing countries in the region. These two countries imported about 78 percent of the total ASEAN import (Table 31, Figure 38-39).

Prices

The average FOB and CIF Price in every countries in 2010 were higher than 2009. 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 50,668 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(crop year 2010/11) is forecast to be 163.47 million tons, up 31.45 million tons which is 23.82 percent from 132.03 million tons in 2010. Only Myanmar is forecast to have less production as compared with previous year (Table 26, Figure 31).

For **Thailand**, the recorded increase in production is predicted due to the increase in area and yield because of the Farmers response to price increase and better crop management. In **Indonesia**, the increase in production is due to the increase in harvested area which offset the decrease in yield. In the **Philippines**, the increase in production attributed to the increase in both area and yield. The expansion of area planted and increase in yield are expected due to the favorable weather. In **Vietnam**, the small increase in production is expected due to the increase in yield but decrease in area planted.

Utilization and Stock

The domestic utilization of sugar in ASEAN in 2011 is forecast to be about 12.41 million tons, up 0.03 million tons which is 0.24 percent compared with previous year (Table 32).

The beginning stock in ASEAN is forecast to increase from 3.02 million tons in 2010 to 4.08 million tons in 2011. The ending stock is forecast to increase from 4.08 million tons to 5.06 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 138.78 percent which is about 23.54 percent increase from 2010 (Table 33, Figure 42). The ratio of stock to the domestic utilization (food security ratio) is forecast to increase from 24.35 percent to 32.87 percent during the same period (Table 34, Figure 43).

Trade

Sugar export by ASEAN countries are forecast to increase from 5.21 million tons in 2010 to 7.59 million tons in 2011. Thailand the major exporting country is also predicted to export more than previous year (Table 32, Figure 35 and 37).

For import, The ASEAN countries collectively are predicted to import less of sugar, from 3.97 million tons in 2010 to 3.93 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	**134,047.70**	**132,027.26**	**-2,020.44**	**-1.51**	**163,474.57**	**31,447.31**	**23.82**
Brunei	-	-	-	-	-	-	-
Cambodia	350.16	365.56	15.40	4.40	377.00	11.45	3.13
Indonesia	18,523.50	18,597.18	73.68	0.40	19,630.02	1,032.84	5.55
Lao PDR	433.50	818.68	385.18	88.85	1,452.50	633.83	77.42
Malaysia	-	-	-	-	-	-	-
Myanmar	9,744.22	9,561.98	-182.24	-1.87	9,228.59	-333.39	-3.49
Philippines	22,932.82	17,929.27	-5,003.55	-21.82	20,701.55	2,772.28	15.46
Singapore	-	-	-	-	-	-	-
Thailand	66,816.45	68,807.80	1,991.35	2.98	95,950.42	27,142.62	39.45
Vietnam	15,247.06	15,946.80	699.74	4.59	16,134.50	187.70	1.18

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	**2,294.25**	**2,306.24**	**11.98**	**0.52**	**2,585.47**	**279.23**	**12.11**
Brunei	-	-	-	-	-	-	-
Cambodia	13.53	17.21	3.67	27.15	17.50	0.29	1.70
Indonesia	473.84	478.21	4.37	0.92	475.81	-2.39	-0.50
Lao PDR	13.83	15.36	1.53	11.03	35.00	19.65	127.94
Malaysia	-	-	-	-	-	-	-
Myanmar	165.27	160.12	-5.15	-3.12	151.51	-8.61	-5.38
Philippines	404.04	359.47	-44.57	-11.03	381.90	22.43	6.24
Singapore	-	-	-	-	-	-	-
Thailand	963.65	1,009.58	45.94	4.77	1,259.24	249.66	24.73
Vietnam	260.10	266.30	6.20	2.38	264.50	-1.80	-0.68

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	**2,251.07**	**2,255.57**	**4.49**	**0.20**	**2,563.57**	**308.00**	**13.66**
Brunei	-	-	-	-	-	-	-
Cambodia	13.48	17.07	3.59	26.62	17.50	0.43	2.51
Indonesia	443.83	446.15	2.32	0.52	473.92	27.77	6.23
Lao PDR	13.83	15.36	1.53	11.03	35.00	19.65	127.94
Malaysia	-	-	-	-	-	-	-
Myanmar	161.78	157.69	-4.10	-2.53	151.51	-6.17	-3.92
Philippines	404.04	359.47	-44.57	-11.03	381.90	22.43	6.24
Singapore	-	-	-	-	-	-	-
Thailand	954.01	993.54	39.53	4.14	1,239.23	245.69	24.73
Vietnam	260.10	266.30	6.20	2.38	264.50	-1.80	-0.68

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	**59.55**	**58.53**	**-1.02**	**-1.71**	**63.77**	**5.24**	**8.95**
Brunei	-	-	-	-	-	-	-
Cambodia	25.97	21.41	-4.56	-17.56	21.54	0.13	0.61
Indonesia	41.74	41.68	-0.06	-0.14	41.42	-0.26	-0.62
Lao PDR	31.34	53.32	21.98	70.13	41.50	-11.82	-22.17
Malaysia	-	-	-	-	-	-	-
Myanmar	60.23	60.64	0.41	0.68	60.91	0.27	0.45
Philippines	56.76	49.88	-6.88	-12.12	54.21	4.33	8.68
Singapore	-	-	-	-	-	-	-
Thailand	70.04	69.26	-0.78	-1.11	77.43	8.17	11.80
Vietnam	58.62	59.88	1.26	2.15	61.00	1.12	1.87

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	**135**	**10,443**	**5,600**	**-**	**2,434**	**32,056**	**50,668**
Brunei	-	-	-	-	-	-	-
Cambodia	135	-	-	-	-	-	135
Indonesia	-	-	-	-	-	32,056	32,056
Lao PDR.	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	2,434	-	2,434
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	10,443	5,600	-	-	-	16,043
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	**3,015,537**	**13,909,844**	**3,967,918**	**20,893,299**	**12,381,817**	**5,210,610**	**4,080,255**	**21,709,238**
Brunei	5,647	-	5,901	11,548	5,449	0	6,100	11,548
Cambodia	n.a.	36,556	n.a.	36,556	n.a.	n.a.	n.a.	36,556
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.	81,868	212	82,079	81,017	1,063	n.a.	82,079
Malaysia	202,279	-	1,714,627	1,916,906	1,446,053	266,104	204,749	1,916,906
Myanmar	0	956,198	-	956,198	950,365	5,833	0	956,198
Philippines	413,176	1,716,507	269,505	2,399,188	1,929,829	98,500	1,186,798	3,215,127
Singapore	-	-	352,593	352,593	207,483	145,110	0	352,593
Thailand	1,206,392	6,928,713	12,040	8,147,145	2,270,000	4,660,000	1,217,145	8,147,145
Vietnam	189,200	1,328,900	210,000	1,728,100	1,316,000	34,000	378,100	1,728,100

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	**4,080,255**	**17,227,554**	**3,932,885**	**25,240,694**	**12,413,556**	**7,589,073**	**5,200,365**	**25,240,694**
Brunei	6,100	-	5,801	11,901	5,171	-	6,729	11,901
Cambodia	n.a.	37,700	n.a.	37,700	n.a.	n.a.	n.a.	37,700
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.	145,250	n.a.	145,250	145,250	n.a.	n.a.	145,250
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	-	-	420,000	420,000	245,000	175,000	0	420,000
Thailand	1,217,145	9,640,000	12,638	10,869,783	2,500,000	7,000,000	1,369,783	10,869,783
Vietnam	378,100	1,344,542	150,000	1,872,642	1,400,000	40,000	432,642	1,872,642

Note: 1/ The value is estimated by AFSIS Project

n.a. = not available, nil = very small amount and the value of 2011 is forecasting value

Table 33 Ratio of sugar production to domestic utilization in ASEAN countries (Self-sufficiency ratio), 2009-2011

Unit: Ton

Country	2009			2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**14,536,180**	**11,170,546**	**130.13**	**13,909,844**	**12,381,817**	**112.34**	**17,227,554**	**12,413,556**	**138.78**
Brunei	-	-	-	-	5,449	-	-	5,171	-
Cambodia	35,016	34,840	100.50	36,556	n.a.	-	37,700	n.a.	-
Indonesia	2,849,769	4,187,299	68.06	2,861,103	4,175,622	68.52	3,020,000	4,200,000	71.90
Lao PDR	81,974	17,371	471.89	81,868	81,017	101.05	145,250	145,250	100.00
Malaysia	-	-	-	-	1,446,053	-	-	1,495,276	-
Myanmar	974,422	973,552	100.09	956,198	950,365	100.61	922,859	922,859	100.00
Philippines	2,137,891	2,114,203	101.12	1,716,507	1,929,829	88.95	2,117,203	1,500,000	141.15
Singapore	-	242,825	-	-	207,483	-	-	245,000	-
Thailand	7,186,592	2,284,455	314.59	6,928,713	2,270,000	305.23	9,640,000	2,500,000	385.60
Vietnam	1,270,517	1,316,000	96.54	1,328,900	1,316,000	100.98	1,344,542	1,400,000	96.04

Table 34 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2009-2011

Unit: Ton

Country	2009			2010			2011		
	Production	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	**1,908,579**	**11,170,546**	**17.09**	**3,015,537**	**12,381,817**	**24.35**	**4,080,255**	**12,413,556**	**32.87**
Brunei	-	-		5,647	5,449	103.64	6,100	5,171	117.95
Cambodia	1,051	34,840	3.02	n.a.	n.a.	-	n.a.	n.a.	-
Indonesia	961,203	4,187,299	22.96	998,843	4,175,622	23.92	1,087,364	4,200,000	25.89
Lao PDR	n.a.	17,371	-	n.a.	81,017	-	n.a.	145,250	-
Malaysia	-	-	-	202,279	1,446,053	13.99	204,749	1,495,276	13.69
Myanmar	n.a.	973,552	-	n.a.	950,365	-	n.a.	922,859	-
Philippines	n.a.	2,114,203	-	413,176	1,929,829	21.41	1,186,798	1,500,000	79.12
Singapore	0	242,825	-	0	207,483	-	-	245,000	-
Thailand	772,725	2,284,455	33.83	1,206,392	2,270,000	53.15	1,217,145	2,500,000	48.69
Vietnam	173,600	1,316,000	13.19	189,200	1,316,000	14.38	378,100	1,400,000	27.01

Note: n.a. = not available, nil = very small amount and the value of 2011 is forecasting value

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
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	386	383	447	439	395	404	424	432	454	325	448	345	407
		2011	473	478											475
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	533	524	561.6	527.8	515	524	511	552	559	549	649	656	555
		2011	608.3	608.4											608

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	641	712	622
		2011	788	719	829	754									773
Malaysia	Cane or Beet sugar, Chemically puer sucroses	2009	350	387	341	307	387	341	402	370	385	429	424	511	386
		2010	437	554	660	492	515	462	464	427	464	405	474	466	485
		2011	597	536											567

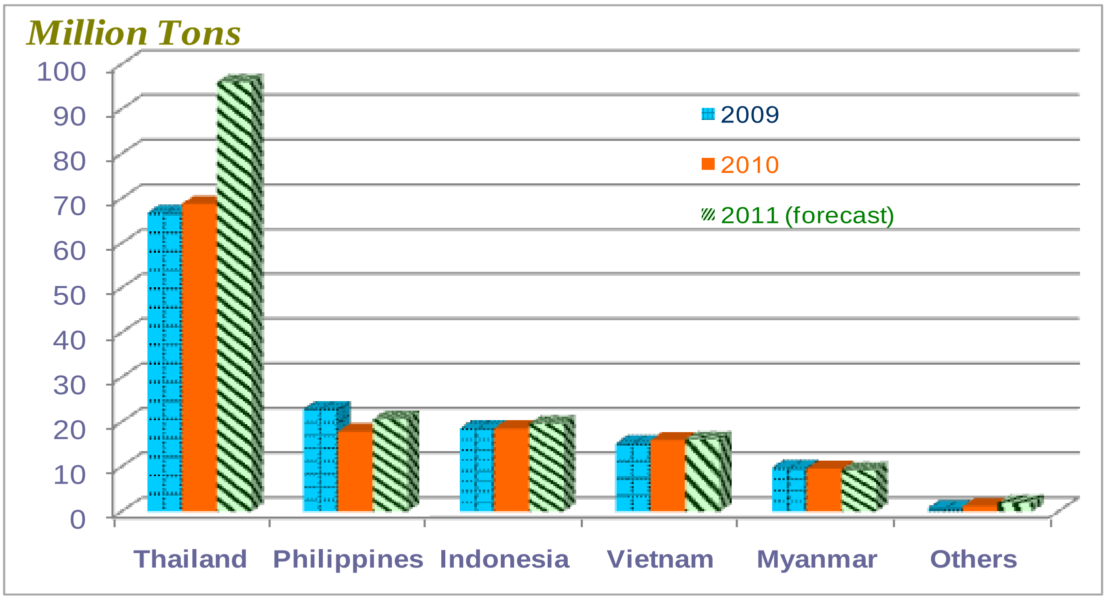


Figure 31 Sugarcane production of selected countries in ASEAN, 2009-2011

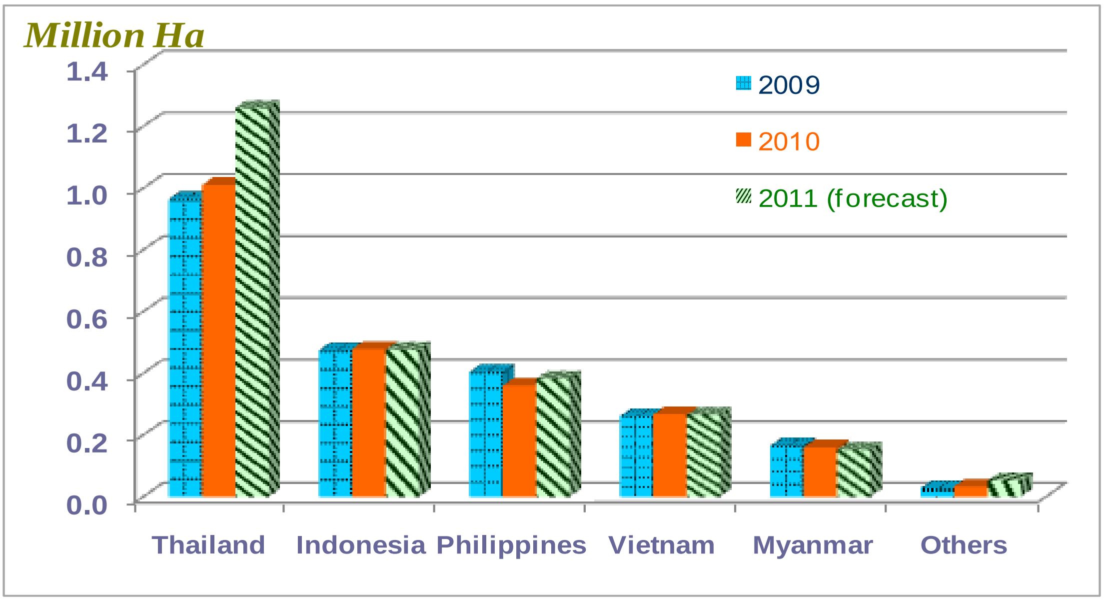


Figure 32 Sugarcane planted area of selected countries in ASEAN, 2009-2011

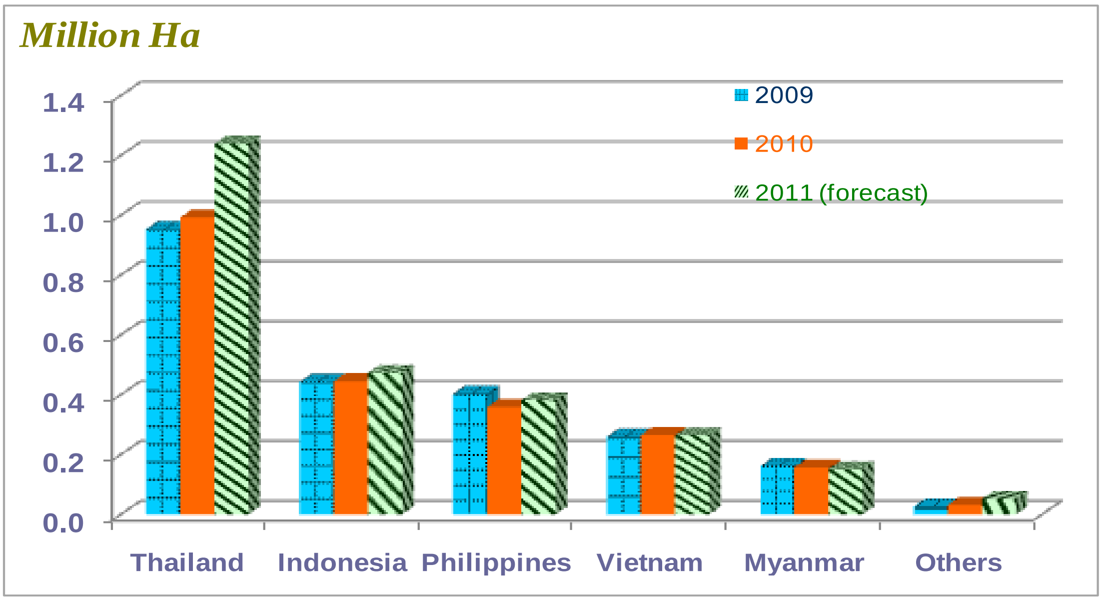


Figure 33 Sugarcane harvested area of selected countries in ASEAN, 2009-2011

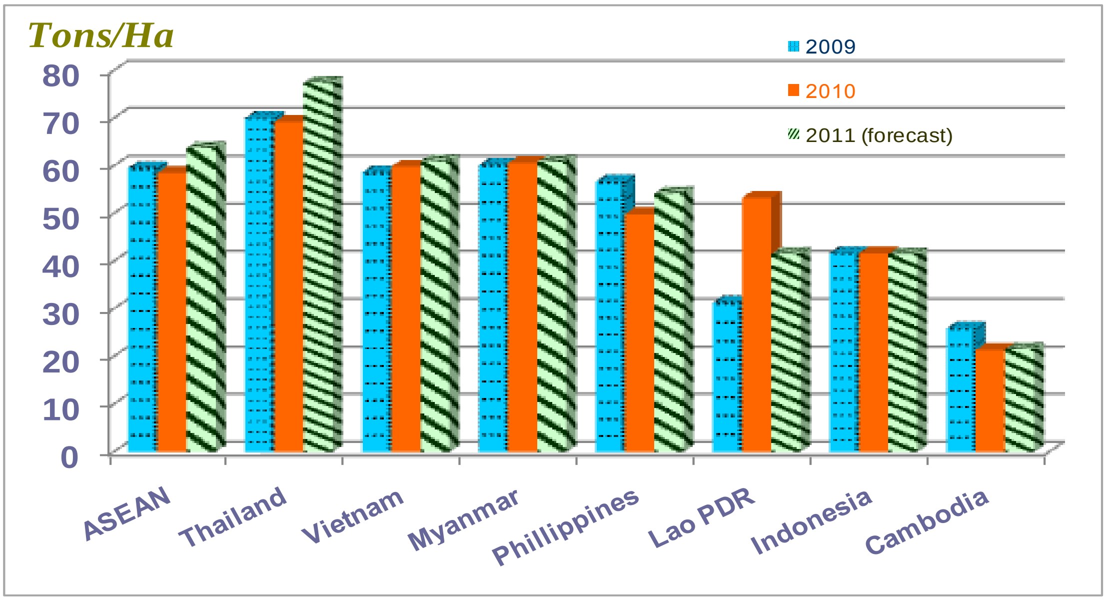


Figure 34 Sugarcane yield of selected countries in ASEAN, 2009-2011

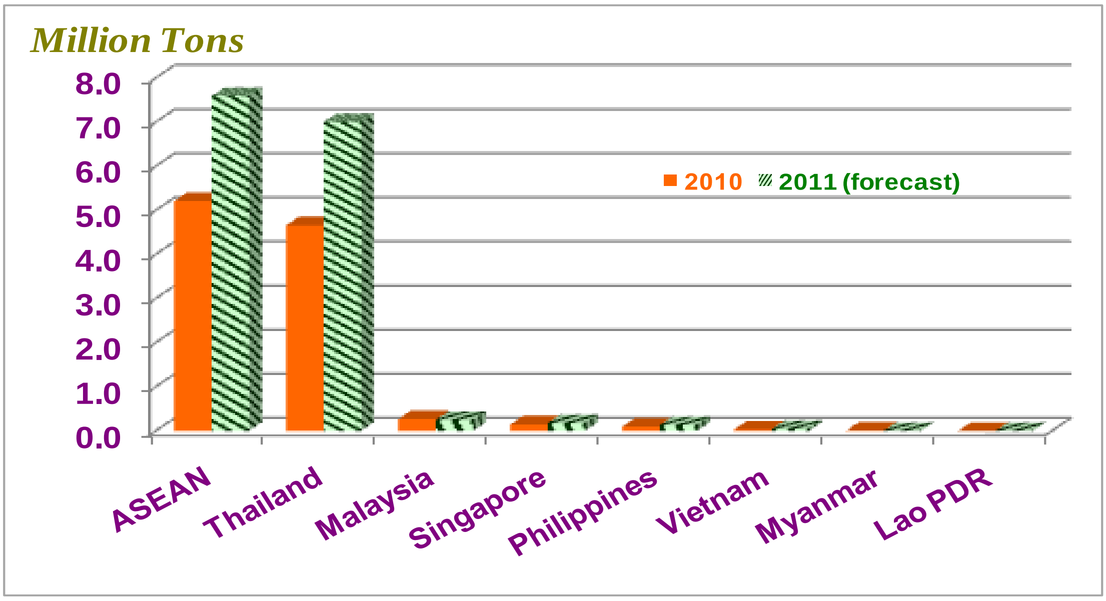


Figure 35 Amount of Sugar export (million tons) of selected countries in ASEAN in 2010-2011

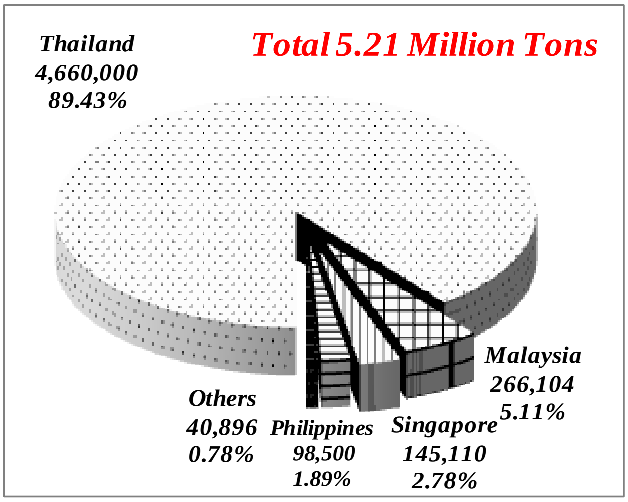


Figure 36 Share of sugar export (tons) among ASEAN countries, 2010

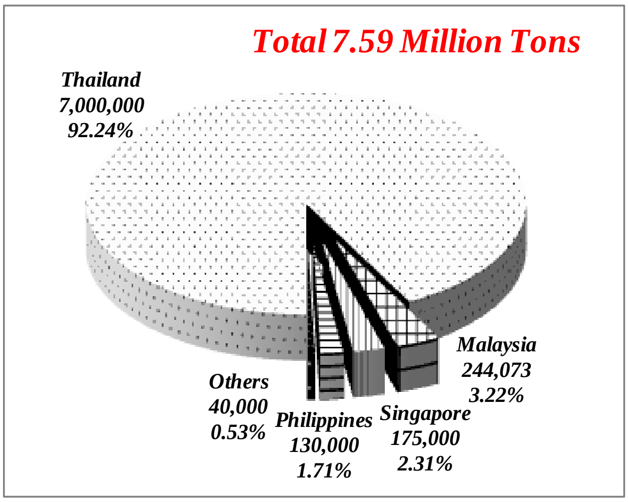


Figure 37 Share of sugar export (tons) among ASEAN countries, 2011

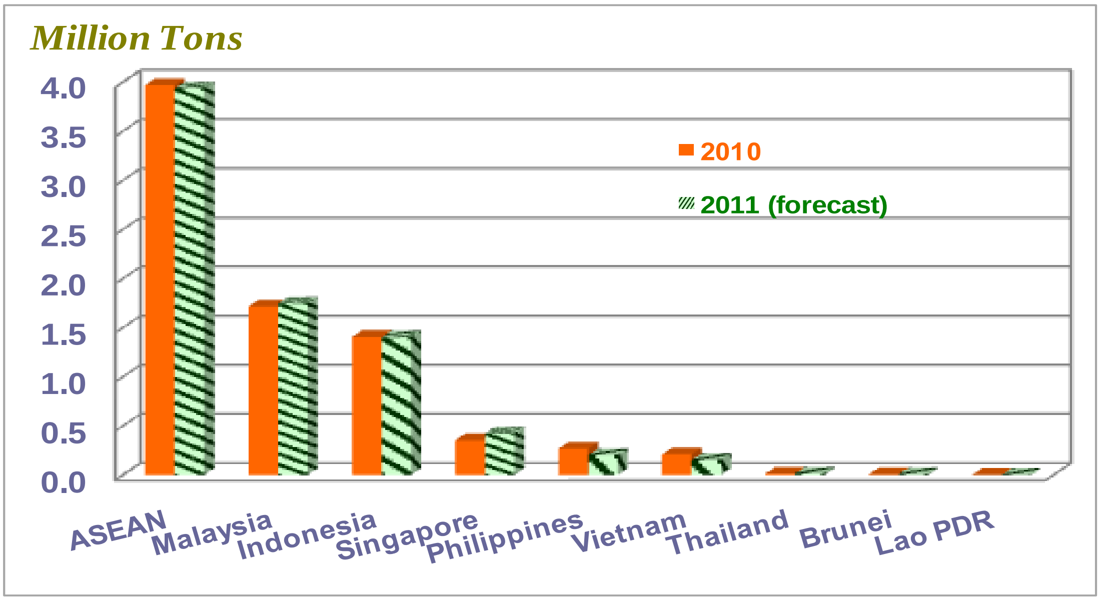


Figure 38 Amount of sugar import (million tons) by selected countries in ASEAN in 2010-2011

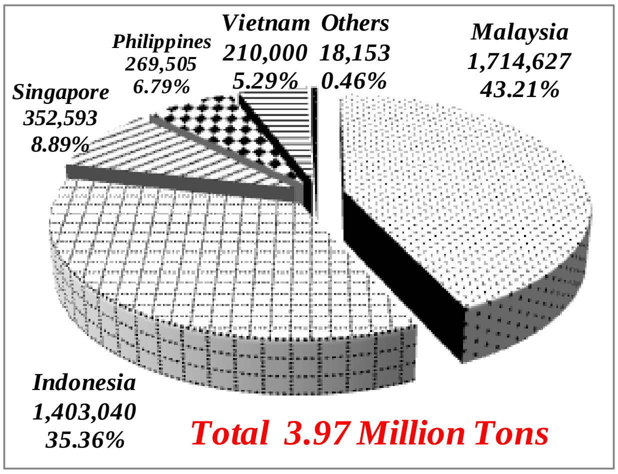


Figure 39 Share of sugar import (ton) among ASEAN countries, 2010

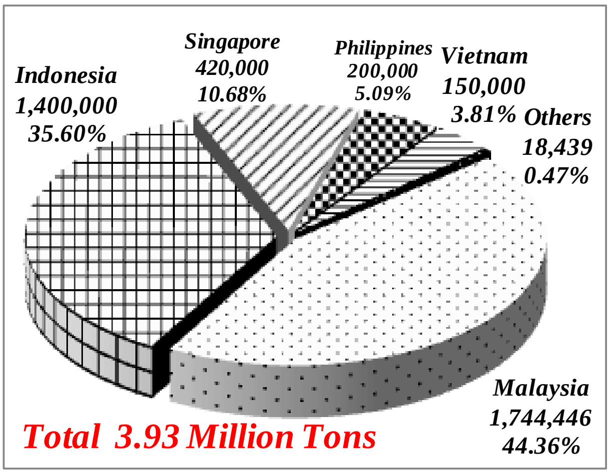


Figure 39 Share of sugar import (ton) among ASEAN countries, 2011

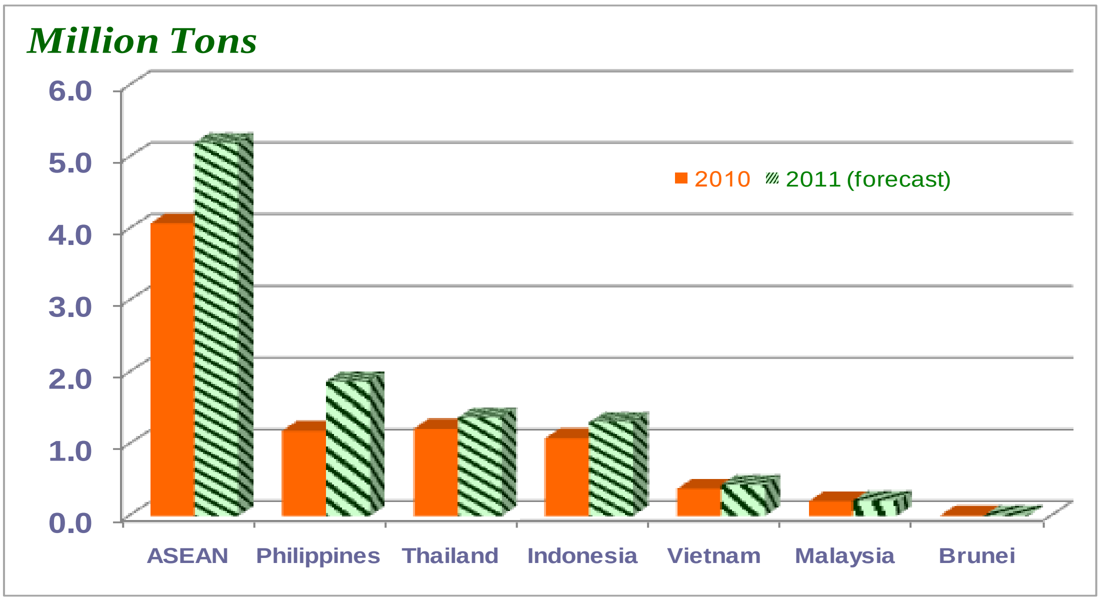


Figure 41 Amount of ending stock of Sugar in ASEAN countries

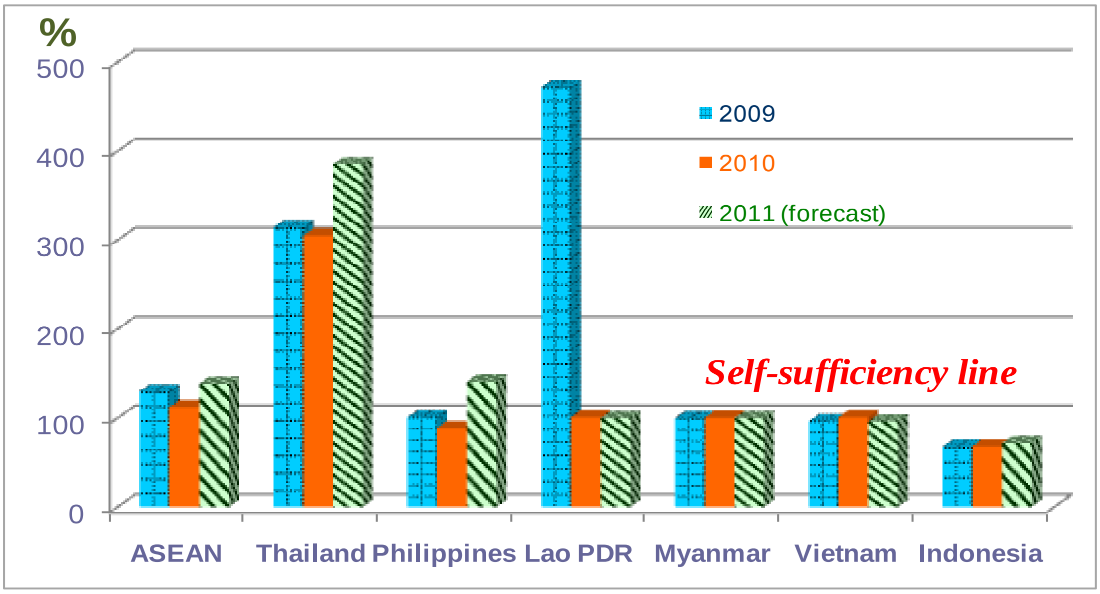


Figure 42 Ratio of sugar production to domestic utilization in ASEAN countries Self-sufficiency ratio), 2009-2011

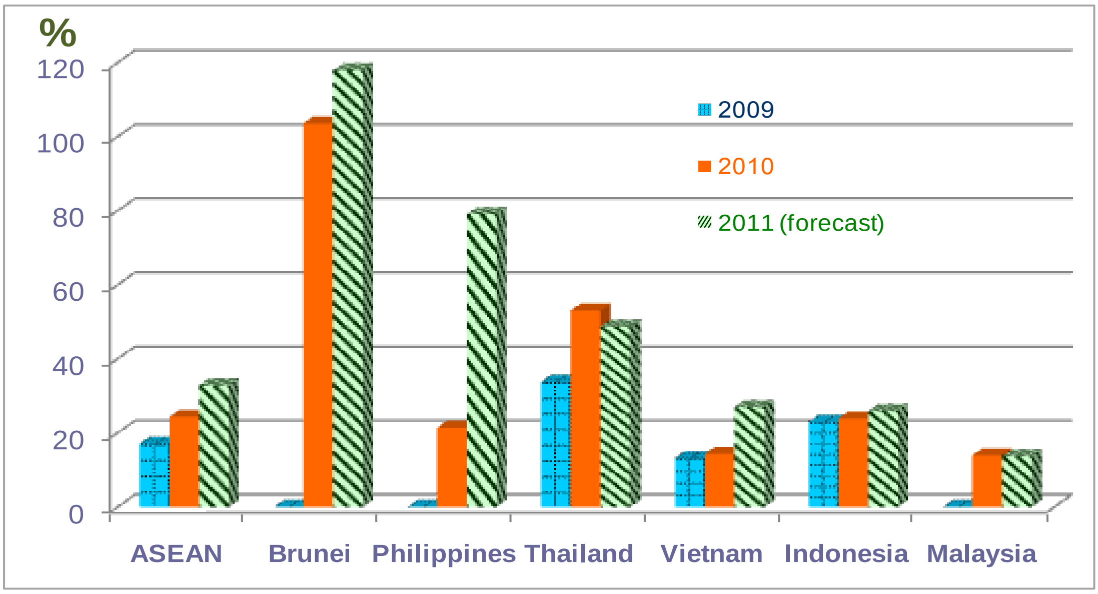


Figure 43 Ratio of sugar beginning stock to domestic utilization in ASEAN countries (Food security ratio), 2009-2011

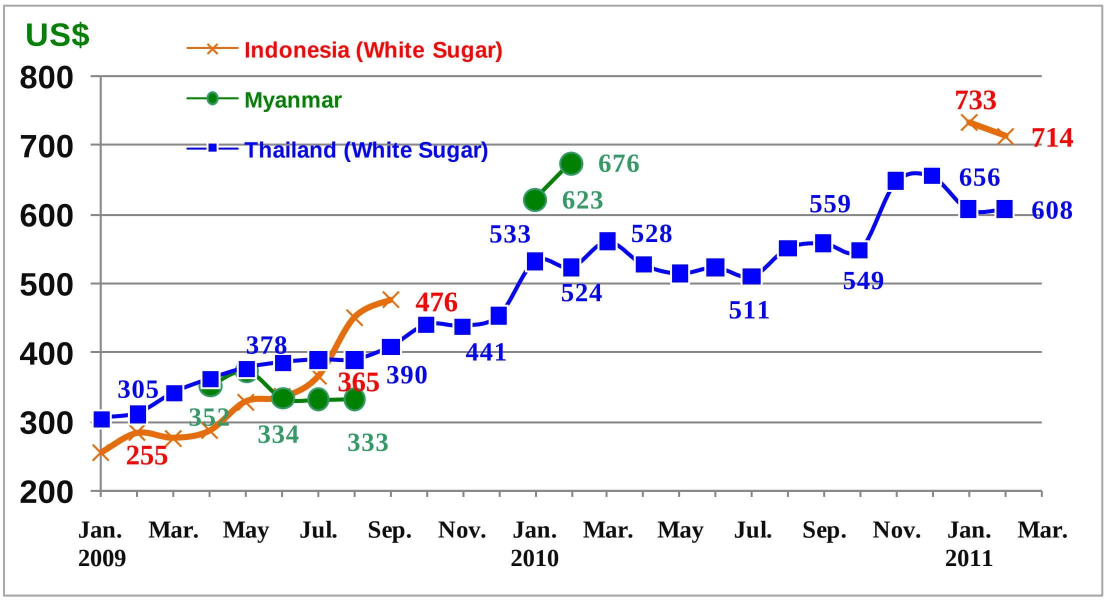


Figure 44 FOB price (US$) of white sugar of selected countries in ASEAN in 2009-2010

Highlights of Soybean Outlook

- Soybean supply in ASEAN is forecast to increase from 8.92 million tons in 2010 to 9.06 million tons in 2011, an increase of about 1.57 percent.
- The increase in supply is attributed to the increase in production and import.
- The production is forecast to increase a little from 1.80 million tons in 2010 to 1.88 million tons in 2011 which is about 4.44 percent increase.
- The beginning stock of 2011 is forecast at 0.20 million tons, rise from 0.16 million tons in 2010, which is about 25.00 percent increase.
- The ending stock of 2011 is forecast to increase about 10.00 percent from 0.20 million tons to 0.22 million tons.
- The ratio of production to domestic utilization (self-sufficiency ratio) is expected to increase slightly from 21.04 percent in 2010 to 21.71 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 increase from 1.82 percent to 2.29 percent.

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

Items	2010	2011	Change	
			Quantity	%
Supply (Million tons)	8.92	9.06	0.14	1.57
Beginning stock	0.16	0.20	0.04	25.00
Production	1.80	1.88	0.08	4.44
Import	6.96	6.98	0.02	0.29
Demand (Million tons)	8.92	9.06	0.14	1.57
Domestic utilization	8.57	8.64	0.07	0.82
Export	0.15	0.19	0.04	26.67
Ending stock	0.20	0.22	0.02	10.00
Ratio of production to domestic utilization (%)	21.04	21.71	0.67	3.18
Ratio of beginning stock to domestic utilization (%)	1.82	2.29	0.47	25.82

ASEAN Soybean Situation in 2010

Production

The estimate of soybean production in ASEAN in 2010 (crop year 2009/10) was 1.80 million tons, an increase of 0.04 million tons or 2.22 percent from 1.76 million tons in 2009. The increase in production was due to the increase in 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. As a result, the production has increased.

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 production has increased due to the increase in yield that covered the reduction in planted area. The reduction of the total planted area was due to the reduction of the area of the second (major) crop as a result of the decrease in price. However, the increase in yield due to the favorable weather.

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 both 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 8.57 million tons (Table 43). The ratio of production to domestic utilization (self sufficiency ratio) for 2010 was 21.04 percent (Table 45, Figure 56) which meant that ASEAN region as a whole was not self sufficient in soybeans. Only Cambodia, Lao PDR and Myanmar produced enough for their own consumption.

The beginning stock of soybeans in 2010 was estimated at 0.16 million tons while the ending stock was estimated at 0.20 million tons (Table 43). Thailand has the most stock in the region. The ratio of the beginning stock to the domestic utilization (food security ratio) is estimated at 1.82 percent. Most countries have very low ratios, except Cambodia which has the ratio 15.31 percent (Table 46, Figure 57).

Trade

In 2010, ASEAN altogether exported about 0.15 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 6.96 million tons. The major importing countries in the region were Vietnam, Thailand and Indonesia (Table 43, Figure 52 and 53).

Prices

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

Damaged Area

The soybean damaged area in 2010 for the whole ASEAN was about 5,586 hectares, mostly due to the drought in Thailand and Cambodia (Table 42).

Prospects for Soybeans in 2011

Production

Soybean production of ASEAN in 2011 is forecast to be 1.88 million tons, up 0.08 million tons which is about 4.46 percent from 1.80 million tons in 2010 (Table 38, Figure 45). The increase in production is expected for all producing countries in ASEAN except the Philippines which the production are predicted to be about the same. Indonesia, the biggest producing country in ASEAN, is also forecast to increase about 2.85 percent. 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 and Myanmar are the two countries that are expected to have a reduction in planted area due to the shortage and high price of soybean seed (Table 38-41, Figure 45-48).

Utilization and Stock

The domestic utilization of soybeans in ASEAN is forecast to increase about 0.82 percent from 8.57 million tons to 8.64 million tons due to growing demand for feeds (Table 43 and 44).

The beginning stock in ASEAN is estimated to increase by 0.04 million ton or 25.00 percent from 0.16 million ton in 2010 to 0.20 million ton in 2011. The ending stock is forecast to increase about 10.00 percent from 0.20 million tons to 0.22 million tons in 2011 (Table 43 and 44, Figure 55).

The ratio of production to domestic utilization (self–sufficiency ratio) is forecast to be 21.71 percent compared with 21.04 in the previous year (Table 45, Figure 56). The ratio of beginning stock to the domestic utilization (food security ratio) is forecast to be 2.29 percent compared with 1.82 in 2010 (Table 46, Figure 57).

Trade

Although soybean export from ASEAN is forecast to increase by 25.82 percent from 0.15 million ton to 0.19 million ton, this volume is considered small compared with the total regional demand (Table 43 and 44, Figure 49 and 51). The import is forecast to increase by about 0.29 percent from 6.96 million tons in 2010 to 6.98 million tons in 2011 (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	**1,763.73**	**1,802.83**	39.10	**2.22**	**1,883.16**	**80.32**	**4.46**
Brunei	-	-	-	-	-	-	-
Cambodia	137.28	156.60	19.32	14.08	192.00	35.40	22.61
Indonesia	974.51	908.11	-66.40	-6.81	934.00	25.89	2.85
Lao PDR	10.60	11.44	0.84	7.93	25.75	14.32	125.19
Malaysia	-	-	-	-	-	-	-
Myanmar	240.05	253.68	13.63	5.68	255.41	1.73	0.68
Philippines	0.84	0.81	-0.03	-3.56	0.81	0.00	-0.25
Singapore	-	-	-	-	-	-	-
Thailand	186.85	175.30	-11.56	-6.19	176.03	0.74	0.42
Vietnam	213.60	296.90	83.30	39.00	299.15	2.25	0.76

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	**1,261.56**	**1,252.23**	**-9.33**	**-0.74**	**1,277.53**	**25.30**	**2.02**
Brunei	-	-	-	-	-	-	-
Cambodia	96.39	103.20	6.81	7.07	114.00	10.80	10.47
Indonesia	724.74	662.95	-61.79	-8.53	669.80	6.85	1.03
Lao PDR	8.49	7.24	-1.25	-14.73	16.50	9.27	128.06
Malaysia	-	-	-	-	-	-	-
Myanmar	166.48	170.90	4.42	2.65	168.96	-1.94	-1.14
Philippines	0.63	0.55	-0.08	-12.16	0.55	0.00	0.00
Singapore	-	-	-	-	-	-	-
Thailand	118.74	109.59	-9.14	-7.70	108.72	-0.87	-0.80
Vietnam	146.10	197.80	51.70	35.39	199.00	1.20	0.61

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	**1,253.96**	**1,246.25**	**-7.71**	**-0.61**	**1,269.62**	**23.37**	**1.87**
Brunei	-	-	-	-	-	-	-
Cambodia	94.37	101.78	7.41	7.85	113.00	11.22	11.02
Indonesia	722.79	661.71	-61.08	-8.45	666.70	4.99	0.75
Lao PDR	8.49	7.24	-1.25	-14.73	16.50	9.27	128.06
Malaysia	-	-	-	-	-	-	-
Myanmar	166.48	170.90	4.42	2.65	168.96	-1.94	-1.14
Philippines	0.63	0.55	-0.08	-12.16	0.55	0.00	-0.36
Singapore	-	-	-	-	-	-	-
Thailand	115.10	106.27	-8.83	-7.67	104.91	-1.36	-1.28
Vietnam	146.10	197.80	51.70	35.39	199.00	1.20	0.61

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**	**1.447**	**0.04**	**2.85**	**1.483**	**0.040**	**2.53**
Brunei	-	-	-	-	-	-	-
Cambodia	1.455	1.539	0.08	5.77	1.699	0.160	10.44
Indonesia	1.348	1.372	0.02	1.79	1.401	0.030	2.08
Lao PDR	1.249	1.581	0.33	26.58	1.561	-0.020	-1.26
Malaysia	-	-	-	-	-	-	-
Myanmar	1.442	1.484	0.04	2.95	1.512	0.030	1.84
Philippines	1.347	1.479	0.13	9.79	1.481	0.000	0.12
Singapore	-	-	-	-	-	-	-
Thailand	1.623	1.649	0.03	1.61	1.678	0.030	1.73
Vietnam	1.462	1.501	0.04	2.67	1.503	0.000	0.15

Note: Yield related to havested 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	Unspecify	Total
ASEAN	**0**	**4,736**	**0**	**0**	**850**	**5,586**
Brunei	0	0	0	0	0	-
Cambodia	-	1,416	-	-	-	1,416
Indonesia	-	-	-	-	850	850
Lao PDR	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0
Myanmar	0	0	0	0	0	0
Philippines	0	0	0	0	0	0
Singapore	0	0	0	0	0	0
Thailand	0	3,320	0	0	0	3,320
Vietnam	0	0	0	0	0	0

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	**156,340**	**1,802,822**	**6,956,658**	**8,915,820**	**8,567,672**	**150,177**	**197,971**	**8,915,820**
Brunei	n.a.	-	559	559	559	0	n.a.	559
Cambodia	5,033	156,589	0	161,622	32,884	120,574	8,164	161,622
Indonesia	400	908,111	1,772,663	2,681,174	2,672,235	8,653	286	2,681,174
Lao PDR	n.a.	11,435	n.a.	11,435	11,435	n.a.	n.a.	11,435
Malaysia	n.a.	-	637,744	637,744	618,282	19,462	0	637,744
Myanmar	0	253,680	nil	253,680	253,680	0	0	253,680
Philippines	0	812	109,930	110,742	110,740	2	0	110,742
Singapore	0	-	17,057	17,057	16,525	532	0	17,057
Thailand	150,607	175,295	1,818,705	2,144,607	1,954,332	954	189,321	2,144,607
Vietnam	300	296,900	2,600,000	2,897,200	2,897,000	0	200	2,897,200

Table 44 Soybean balance sheet of ASEAN countries, 2011

Unit : Ton

Country	Supply				Demand			
	Beginning	Production	Imports	Total	Domestic	Exports	Ending stock	Total
ASEAN	**197,971**	**1,876,720**	**6,983,629**	**9,058,320**	**8,642,862**	**194,045**	**221,413**	**9,058,320**
Brunei	n.a.	-	576	576	576	0	0	576
Cambodia	8,164	192,000	0	200,164	40,320	154,127	5,717	200,164
Indonesia	286	934,003	1,772,663	2,706,952	2,698,095	8,653	204	2,706,952
Lao PDR	n.a.	24,750	n.a.	24,750	24,750	n.a.	n.a.	24,750
Malaysia	n.a.	-	511,333	511,333	481,068	30,265	n.a.	511,333
Myanmar	0	255,409	0	255,409	255,409	0	0	255,409
Philippines	0	810	90,871	91,681	91,681	n.a.	n.a.	91,681
Singapore	0	-	20,000	20,000	20,000	-	0	20,000
Thailand	189,321	170,598	1,888,186	2,248,105	2,031,963	1,000	215,142	2,248,105
Vietnam	200	299,150	2,700,000	2,999,350	2,999,000	0	350	2,999,350

Note : n.a. = not available, nil = very small amount and the value of 2011 is forecasting value

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

Unit: Ton

Country	2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**1,802,822**	**8,567,672**	**21.04**	**1,876,720**	**8,642,862**	**21.71**
Brunei	-	559	0	-	576	0
Cambodia	156,589	32,884	476.19	192,000	40,320	476.19
Indonesia	908,111	2,672,235	33.98	934,003	2,698,095	34.62
Lao PDR	11,435	11,435	100.00	24,750	24,750	100.00
Malaysia	-	618,282	0	-	481,068	0
Myanmar	253,680	253,680	100.00	255,409	255,409	100.00
Philippines	812	110,740	0.73	810	91,681	0.88
Singapore	-	16,525	0	-	20,000	0
Thailand	175,295	1,954,332	8.97	170,598	2,031,963	8.40
Vietnam	296,900	2,897,000	10.25	299,150	2,999,000	9.97

Table 46 Ratio of Soybean 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	**156,340**	**8,567,672**	**1.82**	**197,971**	**8,642,862**	**2.29**
Brunei	n.a.	559	-	n.a.	576	-
Cambodia	5,033	32,884	15.31	8,164	40,320	20.25
Indonesia	400	2,672,235	0.01	286	2,698,095	0.01
Lao PDR	n.a.	11,435	0	n.a.	24,750	0
Malaysia	n.a.	618,282	0	n.a.	481,068	0
Myanmar	0	253,680	0	0	255,409	0
Philippines	0	110,740	0	0	91,681	0
Singapore	0	16,525	0	0	20,000	0
Thailand	150,607	1,954,332	7.71	189,321	2,031,963	9.32
Vietnam	300	2,897,000	0.01	200	2,999,000	0.01

Table 47 : FOB Price of Soybean 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
	2011	520	530	510	525	515								520

Table 48 : CIF Price of Soybean in selected ASEAN countries

Unit : US$/Ton

Country	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Malaysia	2009	470	450	471	439	477	503	540	546	550	526	548	476	500
	2010	502	393	500	471	494	476	523	493	509	544	559	610	506
	2011	603	668											636
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	693	715	663
	2011	711	721	760	746									735
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	416	432	445
	2011	484	541	551										525

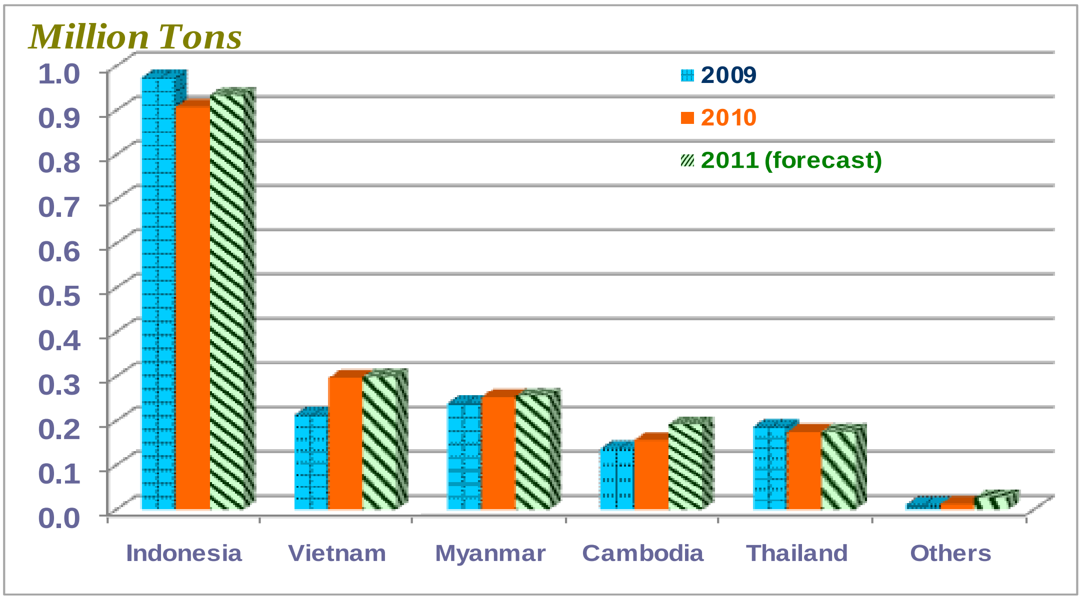


Figure 45 Soybean production of selected countries in ASEAN, 2009-2011

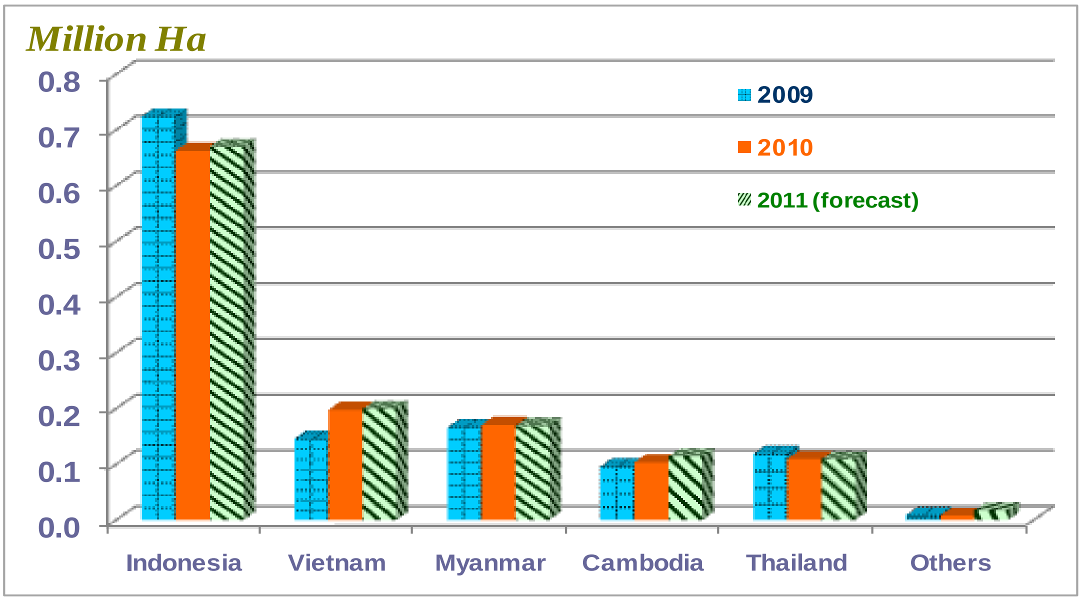


Figure 46 Soybean planted area of selected countries in ASEAN, 2009-2011

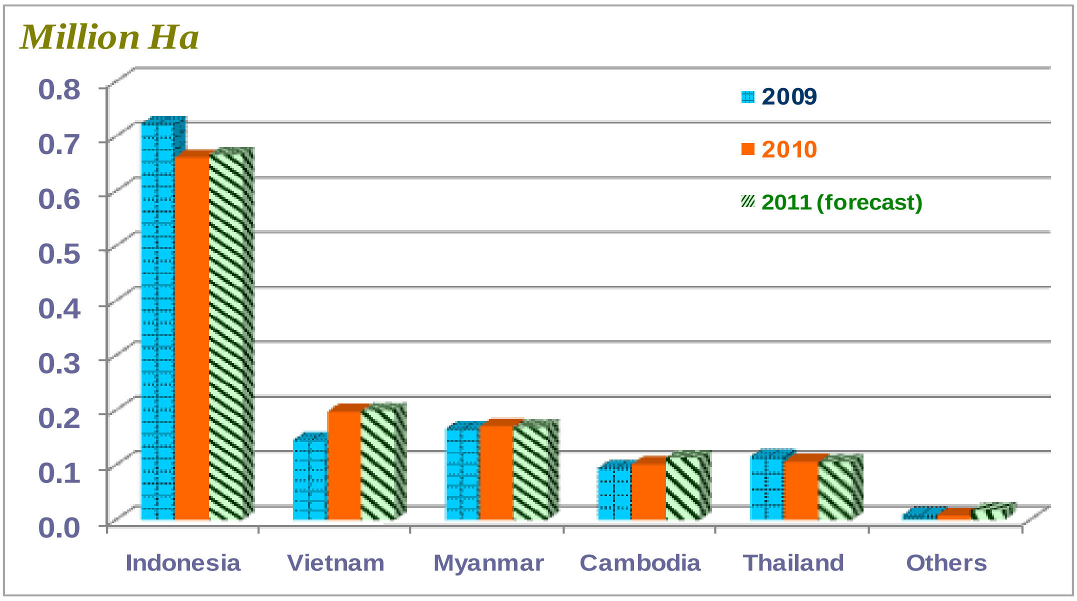


Figure 47 Soybean harvested area of selected countries in ASEAN, 2009-2011

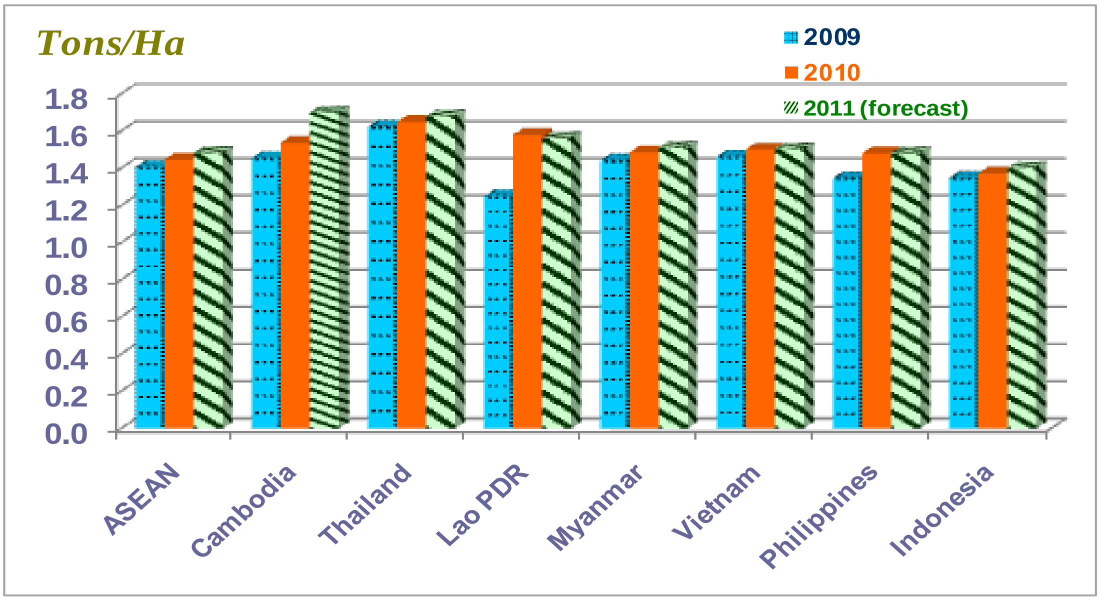


Figure 48 Soybean yield of countries in ASEAN, 2009-2011

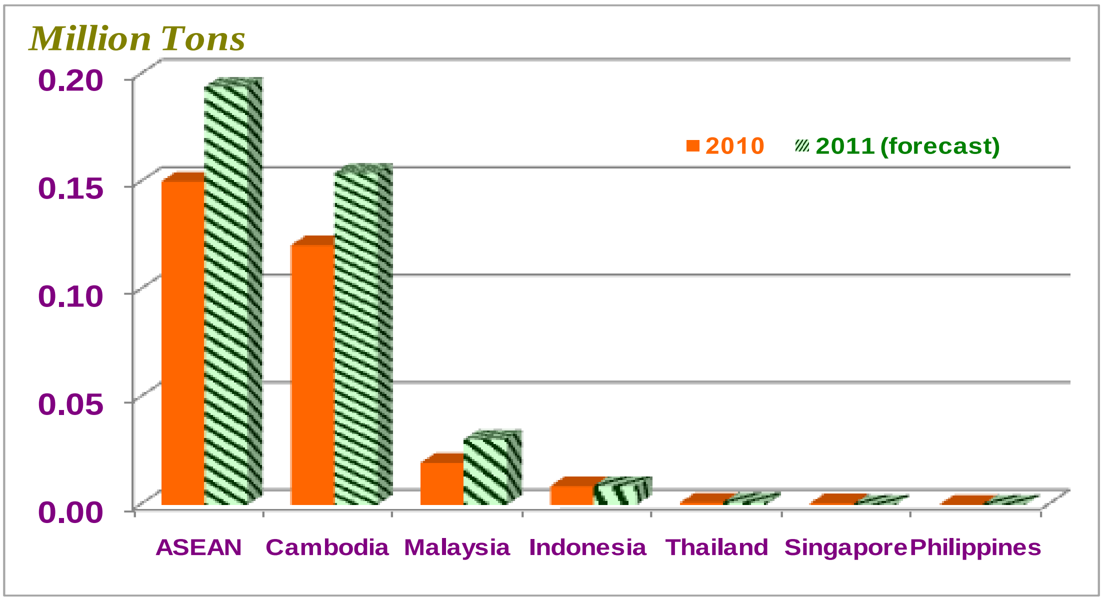


Figure 49 Amount of Soybean export (million tons) of selected countries in ASEAN in 2010-2011

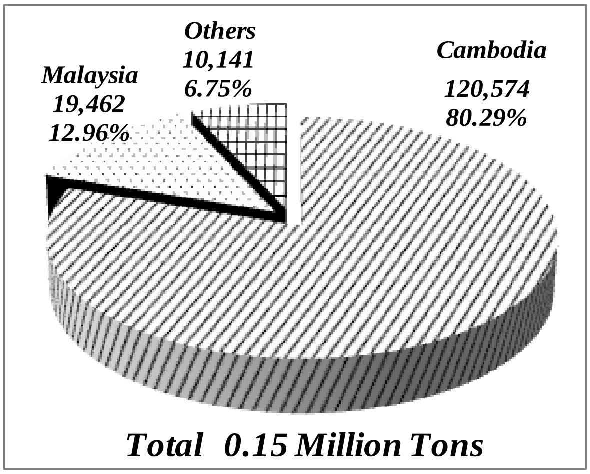


Figure 50 Share of Soybean export (ton) among ASEAN countries, 2010

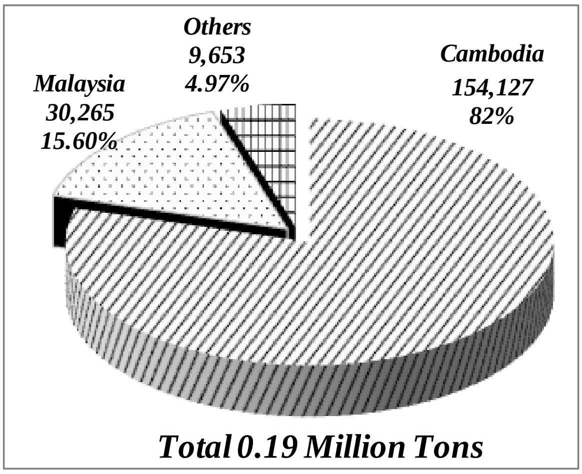


Figure 51 Share of Soybean export (ton) among ASEAN countries, 2011

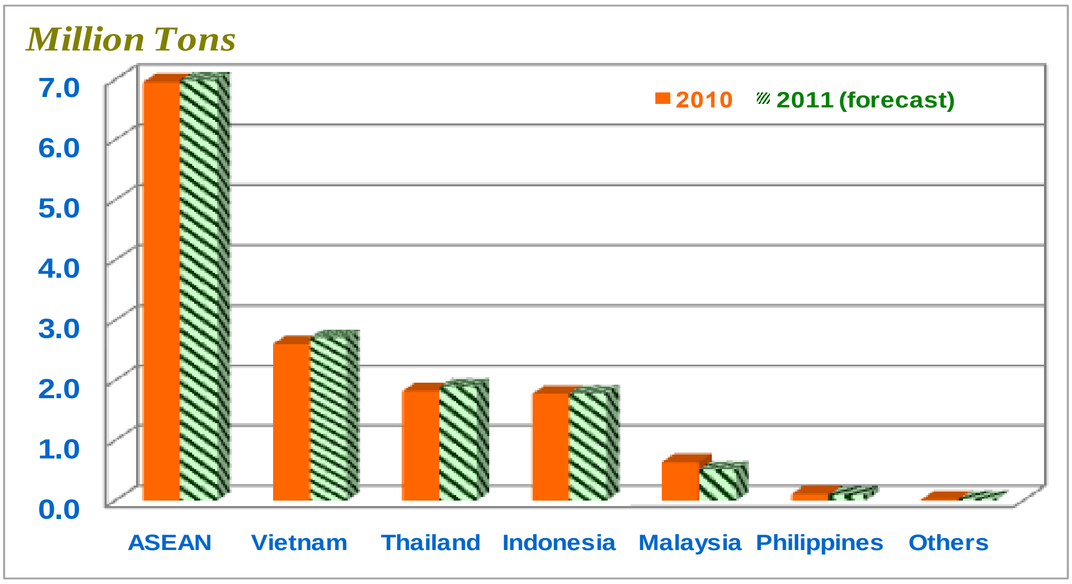


Figure 52 Amount of Soybean import (million tons) by selected countries in ASEAN in 2010-2011

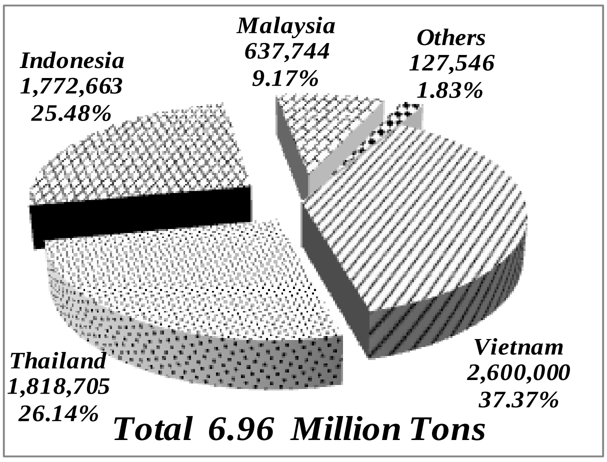


Figure 53 Share of Soybean import (ton) among ASEAN countries, 2010

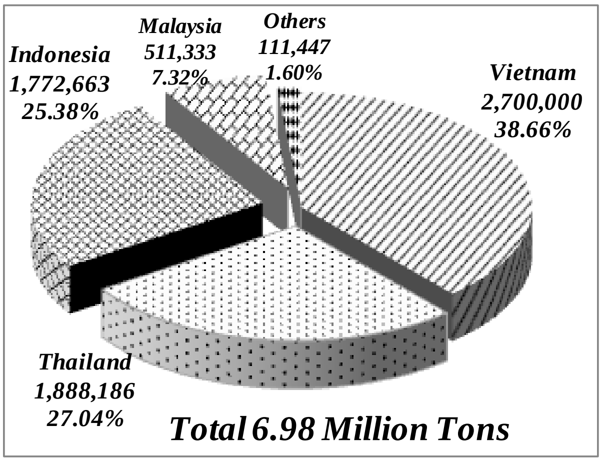


Figure 54 Share of Soybean import (ton) among ASEAN countries, 2011

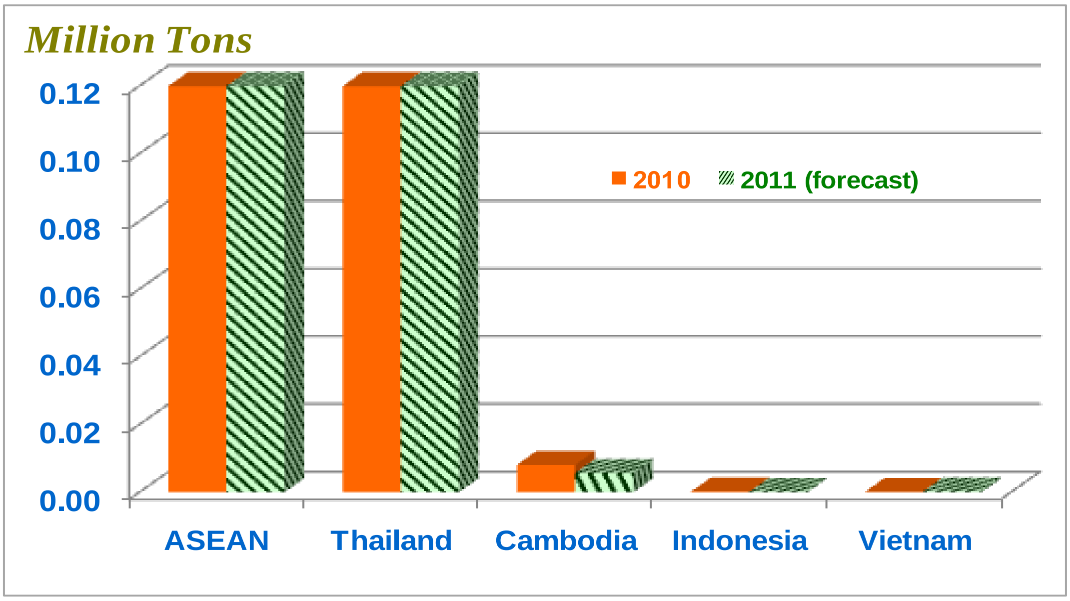


Figure 55 Amount of ending stock of soybean in ASEAN countries

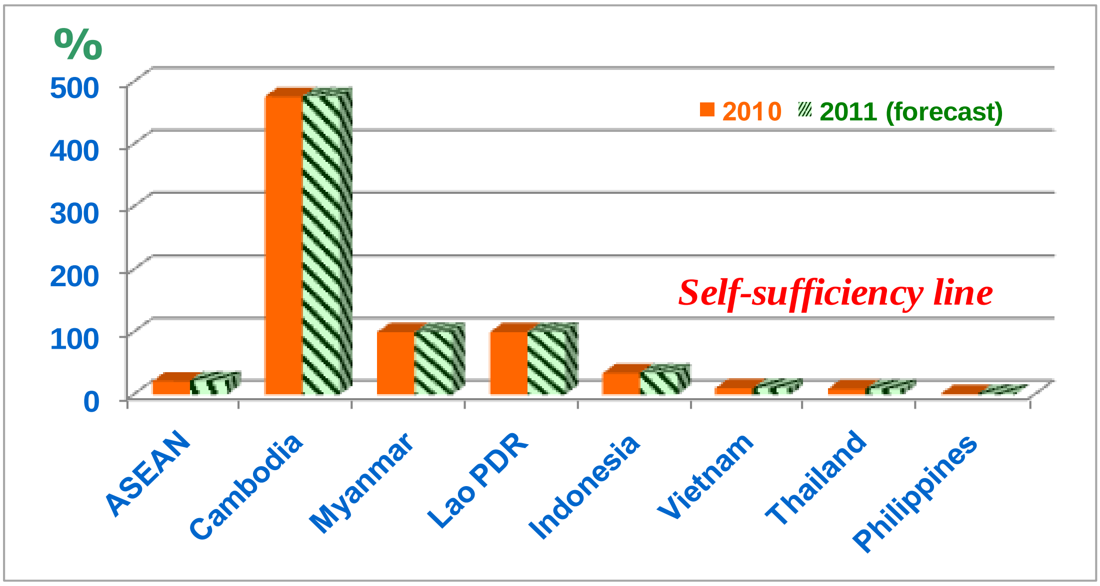


Figure 56 Ratio of Soybean production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

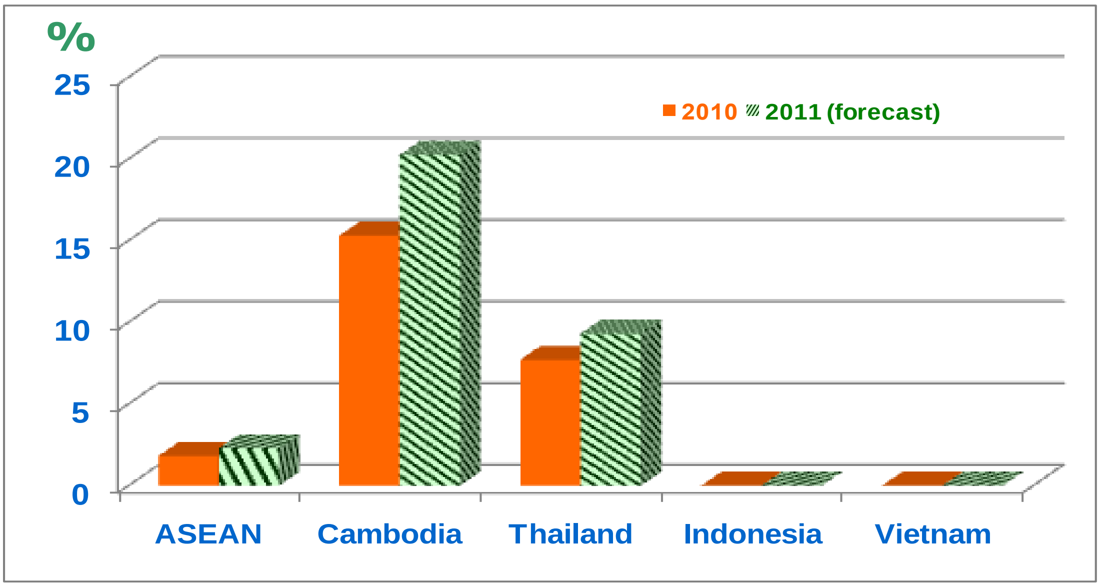


Figure 57 Ratio of Soybean beginning stock to domestic utilization in ASEAN countries (Food security ratio)

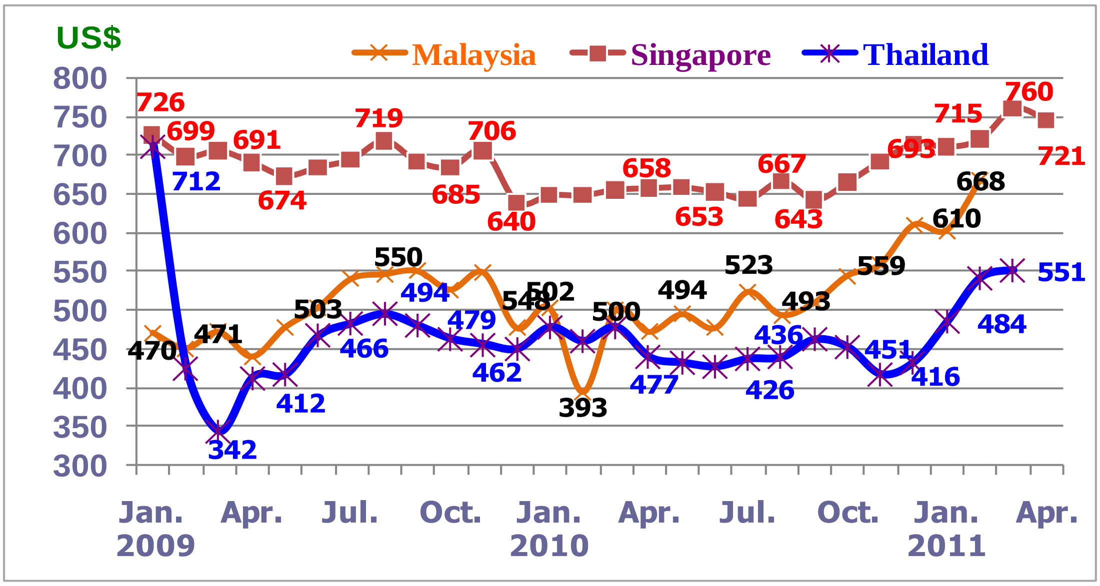


Figure 58 CIF price (US$) of milled Soybean of selected countries in ASEAN in 2009-2011

Highlights of Cassava Outlook

- Cassava supply in ASEAN is forecast to decrease from 67.68 million tons in 2010 to 64.05 million tons in 2011, a decrease of about 3.63 million tons or 5.36 percent. The decrease in supply came from the reduction in production and beginning stock.
- The production is forecast to decrease from 61.80 million tons in 2010 to 61.00 million tons in 2011 which is about 1.29 percent decrease.
- The beginning stock is forecast to reduce from 5.17 million tons to 2.15 million tons, which is about 58.41 percent reduction.
- The ending stock of 2011 is predicted to be 3.29 million tons, an increase of 1.14 million tons, compared with 2.15 million tons in 2010.
- The ratio of production to domestic utilization (self-sufficiency ratio) in 2011 is forecast to be 155.12 percent which is about the same as compared with 154.84 percent in 2010.
- The ratio of beginning stock to domestic utilization (food security ratio) in 2011 is predicted to be 5.48 percent down from 12.96 percent in 2010.

Table 49 Summary of the ASEAN cassava situation, 2010-2011

Items	2010	2011	Change	
			Quantity	%
Supply (Million tons)	67.68	64.05	-3.63	-5.36
Beginning stock	5.17	2.15	-3.02	-58.41
Production	61.80	61.00	-0.80	-1.29
Import	0.70	0.90	0.20	28.57
Demand (Million tons)	67.68	64.05	-3.63	-5.36
Domestic utilization	39.91	39.32	-0.59	-1.48
Export	25.61	21.44	-4.17	-16.28
Ending stock	2.15	3.29	1.14	53.02
Ratio of production to domestic utilization (%)	154.84	155.12	0.28	0.18
Ratio of beginning stock to domestic utilization (%)	12.96	5.48	-7.48	-57.72

ASEAN Cassava Situation in 2010

Production

The estimate production of cassava in ASEAN in 2010 (crop year 2009/10) was 61.80 million tons, down 4.98 million tons which is 7.45 percent from 66.78 million tons in 2009. The reduction in production was due to the decrease in both harvested area and yield. Thailand is the number one cassava producing country in ASEAN and followed by Indonesia. Brunei and Singapore do not produce cassava (Table 50-53, Figure 59-62).

In **Cambodia**, even though the yield has decreased, the production has increased as a result of the increased in planted area. The expansion of the planted area was due to the farmers responded to the price increase and the decrease in price of competing crops as well as the favorable weather.

For **Lao PDR**, the increase in production were attributed to the increase in both planted area and yield. The expansion of the area was due to the positive response of the farmers to the price increase. The increase in yield was the result of the good weather.

In **Malaysia**, the production has decreased due to the decrease in both planted area and yield. The decrease in yield was affected by pest and diseases.

For **Myanmar,** the increase in production was a result in increasing of both planted area and yield. The expansion of the area was due to the increase in price received by farmers.

For the **Philippines**, the increase in production was a result in increasing of both planted area and yield. The expansion of the area was a result of the increase in demand for industrial purpose while the increase in yield was a result of the farmers used more improved variety.

In **Thailand**, the production has decreased due to the decrease in area as result of the increase in prices of the competing crops together with the unfavorable weather.

In **Vietnam**, the increase in yield could not compensate the reduction in planted area. As a result, the production has decreased. The reduction in planted area was due to the decrease in price of cassava while the increase in yield was due to the farmers used more improved variety.

Utilization and Stock

The domestic utilization of cassava in ASEAN in 2010 was estimated at 39.91 million tons (Table 55). The ratio of production to domestic utilization (self-sufficient ratio) for 2010 for ASEAN was 154.84 percent which implied that the ASEAN as a whole could produce about 54 percent above the demand for domestic utilization (Table 57, Figure 70). For producing countries, every country produces about equal domestic consumption. Thailand, Vietnam and Cambodia have the higher self-sufficient ratio than other countries. The ratio of beginning stock to domestic utilization (food security ratio) for ASEAN is 12.96 percent (Table 58, Figure 71).

Trade

In 2010, ASEAN as a whole exported about 25.61 million tons of cassava products (Table 49). Thailand alone exported about 19.72 million tons or 77 percent of the total export from the ASEAN. Vietnam and Cambodia are the others major exporter of cassava in ASEAN which in 2010 exported about 4.15 million tons and 1.57 million tons respectively (Table 55).

For the import, ASEAN imported about 0.70 million tons in 2010 (Table 49). Thailand and Indonesia are the major importing countries. Both Indonesia and Thailand are considered as both major producing countries as well as major importing countries in ASEAN (Table 55).

Prices

The monthly FOB prices of cassava for exporting countries and CIF prices for importing countries for each type of product are given in table 59 and 60 respectively.

Damaged Area

The cassava damaged area in 2010 for the whole ASEAN was about 52,253 hectares, mostly due to the drought and pests in Thailand and floods in Cambodia (Table 54).

Prospects of Cassava in 2011

Production

Cassava production in 2011 in ASEAN is forecast to be 61.00 million tons, down 0.81 million tons which is about 1.30 percent from 61.80 million tons in 2010 (Table 49). The decrease in production is due to the reduction in area. The major reduction is predicted in Thailand and Indonesia, the major producing countries. The reduction in Thailand is due to the pests.

Utilization and stock

The domestic utilization of cassava in ASEAN is forecast to decrease from 39.91million tons in 2010 to 39.32 in 2011, a decrease of about 1.48 percent due to the insufficient of supply (Table 49).

The beginning stock in ASEAN in 2011 is forecast to be 2.15 million tons, a decrease of about 3.02 million tons or 58.41 percent from 5.17 million tons in 2010 (Table 58, Figure 71).

The ratio of production to domestic utilization (self-sufficiency ratio) is forecast to be 155.12 percent, down a little as compares with 154.84 percent in 2010. The ratio of beginning stock to the domestic utilization (food security ratio) is predicted to be 5.48 percent in 2011 which is much lower than 12.96 percent in 2011 (Table 57, Figure 70).

Trade

The cassava export in 2011 is expected to be lower than in 2010 due to the shortage of supply. The export of cassava products in 2011 is forecast to be about 21.44 million tons as compared with 25.61 million tons in 2010 (Table 55-56, Figure 63-65). For the import, it is forecast to increase from 0.70 million tons in 2010 to 0.90 million tons in 2011 (Table 55-56, Figure 66-68).

Table 50 Cassava 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	**66,779.72**	**61,803.55**	**-4,976.18**	**-7.45**	**60,997.98**	**-805.57**	**-1.30**
Brunei	-	-	-	-	-	-	-
Cambodia	3,497.31	4,248.94	751.64	21.49	4,620.00	371.06	8.73
Indonesia	22,039.15	23,908.46	1,869.31	8.48	22,901.21	-1,007.25	-4.21
Lao PDR	152.59	500.09	347.50	227.73	306.00	-194.09	-38.81
Malaysia	68.51	39.58	-28.93	-42.23	41.05	1.47	3.70
Myanmar	333.53	477.68	144.15	43.22	487.58	9.90	2.07
Philippines	2,043.72	2,101.45	57.73	2.82	2,172.20	70.75	3.37
Singapore	-	-	-	-	-	-	-
Thailand	30,088.02	22,005.74	-8,082.28	-26.86	21,866.74	-139.00	-0.63
Vietnam	8,556.90	8,521.60	-35.30	-0.41	8,603.20	81.60	0.96

Table 51 Cassava 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	**3,472.28**	**3,392.98**	**-79.30**	**-2.28**	**3,343.98**	**-49.00**	**-1.44**
Brunei	-	-	-	-	-	-	-
Cambodia	160.33	206.23	45.90	28.63	215.00	8.77	4.25
Indonesia	1,175.67	1,182.60	6.94	0.59	1,168.19	-14.42	-1.22
Lao PDR	10.38	19.94	9.57	92.19	17.00	-2.94	-14.74
Malaysia	3.08	2.42	-0.66	-21.30	2.44	0.02	0.99
Myanmar	24.71	40.98	16.27	65.86	44.98	3.99	9.74
Philippines	215.96	217.62	1.67	0.77	220.59	2.96	1.36
Singapore	-	-	-	-	-	-	-
Thailand	1,373.37	1,226.99	-146.38	-10.66	1,175.79	-51.20	-4.17
Vietnam	508.80	496.20	-12.60	-2.48	500.00	3.80	0.77

Table 52 Cassava 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	**3,422.41**	**3,340.73**	**-81.68**	**-2.39**	**3,288.89**	**-51.84**	**-1.55**
Brunei	-	-	-	-	-	-	-
Cambodia	157.08	202.49	45.41	28.91	210.00	7.51	3.71
Indonesia	1,175.67	1,182.60	6.94	0.59	1,168.19	-14.42	-1.22
Lao PDR	10.38	19.94	9.57	92.19	17.00	-2.94	-14.74
Malaysia	3.08	2.42	-0.66	-21.30	2.44	0.02	0.99
Myanmar	24.71	34.63	9.92	40.13	35.28	0.66	1.89
Philippines	215.96	217.62	1.67	0.77	220.59	2.96	1.36
Singapore	-	-	-	-	-	-	-
Thailand	1,326.74	1,184.83	-141.92	-10.70	1,135.39	-49.44	-4.17
Vietnam	508.80	496.20	-12.60	-2.48	500.00	3.80	0.77

Note: Vietnam reported only planted area.

Table 53 Cassava 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	**19.51**	**18.50**	**-1.01**	**-5.18**	**18.55**	**0.05**	**0.27**
Brunei	-	-	-	-	-	-	-
Cambodia	22.26	20.98	-1.28	-5.75	22.00	1.02	4.86
Indonesia	18.75	20.22	1.47	7.84	19.60	-0.62	-3.07
Lao PDR	14.71	25.08	10.37	70.50	18.00	-7.08	-28.23
Malaysia	22.28	16.36	-5.92	-26.57	16.79	0.43	2.63
Myanmar	13.50	13.80	0.30	2.22	13.82	0.02	0.14
Philippines	9.46	9.66	0.20	2.11	9.85	0.19	1.97
Singapore	-	-	-	-	-	-	-
Thailand	22.68	18.57	-4.11	-18.12	19.26	0.69	3.72
Vietnam	16.82	17.17	0.35	2.08	17.21	0.04	0.23

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

Table 54 Cassava damaged area in ASEAN by cause of damage, 2010

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Others	Total
ASEAN	**3,736**	**34,458**	**7,700**	**0**	**6,359**	**52,253**
Brunei	-	-	-	-	-	-
Cambodia	3,736	-	-	-	-	3,736
Indonesia	0	0	0	0	0	0
Lao PDR	-	-	-	-	0	0
Malaysia	0	0	0	0	0	0
Myanmar	0	0	0	0	6,359	6,359
Philippines	0	0	0	0	0	0
Singapore	-	-	-	-	-	-
Thailand	0	34,458	7,700	0	0	42,158
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Table 55 Cassava balance sheet of ASEAN countries, 2010 (Cassava roots fresh)

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**5,172,460**	**61,803,756**	**704,484**	**67,680,700**	**39,914,955**	**25,610,786**	**2,154,959**	**67,680,700**
Brunei	n.a.	211	2	213	213	0	0	213
Cambodia	0	4,248,942	0	4,248,942	2,676,834	1,572,108	0	4,248,942
Indonesia	0	23,908,459	294,840	24,203,299	22,039,000	167,640	1,996,659	24,203,299
Lao PDR	n.a.	500,090	n.a.	500,090	500,090	n.a.	n.a.	500,090
Malaysia	0	39,580	82	39,662	39,424	238	0	39,662
Myanmar[1/]	0	477,680	3,300	480,980	480,980	0	0	480,980
Philippines	0	2,101,454	6,260	2,107,714	2,107,014	700	0	2,107,714
Singapore [1/]	0	-	100,000	100,000	99,900	100	0	100,000
Thailand	5,172,210	22,005,740	300,000	27,477,950	7,600,000	19,720,000	157,950	27,477,950
Vietnam	250	8,521,600	0	8,521,850	4,371,500	4,150,000	350	8,521,850

Table 56 Cassava balance sheet of ASEAN countries, 2011 (Cassava roots fresh)

Unit : Ton

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	**2,154,959**	**60,998,118**	**898,247**	**64,051,324**	**39,322,833**	**21,439,486**	**3,289,005**	**64,051,324**
Brunei	0	140	22	162	162	0	0	162
Cambodia	0	4,620,000	0	4,620,000	2,910,600	1,709,400	0	4,620,000
Indonesia	1,996,659	22,901,207	294,840	25,192,706	22,039,000	167,640	2,986,066	25,192,706
Lao PDR	n.a.	306,000	n.a.	306,000	306,000	n.a.	n.a.	306,000
Malaysia	0	41,045	85	41,131	40,883	247	0	41,131
Myanmar[1/]	0	487,584	3,300	490,884	490,884	0	0	490,884
Philippines	0	2,172,203	0	2,172,203	2,172,104	99	0	2,172,203
Singapore [1/]	0	-	100,000	100,000	99,900	100	0	100,000
Thailand	157,950	21,866,739	500,000	22,524,689	6,760,000	15,462,000	302,689	22,524,689
Vietnam	350	8,603,200	0	8,603,550	4,503,300	4,100,000	250	8,603,550

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

Table 57 Ratio of cassava production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

Unit: Ton

Country	2010			2011		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	**61,803,756**	**39,914,955**	**154.84**	**60,998,118**	**39,322,833**	**155.12**
Brunei	211	213	99.10	140	162	86.69
Cambodia	4,248,942	2,676,834	158.73	4,620,000	2,910,600	158.73
Indonesia	23,908,459	22,039,000	108.48	22,901,207	22,039,000	103.91
Lao PDR	500,090	500,090	100.00	306,000	306,000	100.00
Malaysia	39,580	39,424	100.40	41,045	40,883	100.40
Myanmar	477,680	480,980	99.31	487,584	490,884	99.33
Philippines	2,101,454	2,107,014	99.74	2,172,203	2,172,104	100.00
Singapore	-	99,900	-	-	99,900	-
Thailand	22,005,740	7,600,000	289.55	21,866,739	6,760,000	323.47
Vietnam	8,521,600	4,371,500	194.94	8,603,200	4,503,300	191.04

Table 58 Ratio of cassava 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	**5,172,460**	**39,914,955**	**12.96**	**2,154,959**	**39,322,833**	**5.48**
Brunei	n.a.	213	-	0	162	-
Cambodia	0	2,676,834	0	0	2,910,600	0
Indonesia	0	22,039,000	0	1,996,659	22,039,000	9.06
Lao PDR	n.a.	500,090	-	n.a.	306,000	-
Malaysia	0	39,424	0	0	40,883	0
Myanmar	0	480,980	0	0	490,884	0
Philippines	0	2,107,014	0	0	2,172,104	0
Singapore	0	99,900	0	0	99,900	0
Thailand	5,172,210	7,600,000	68.06	157,950	6,760,000	2.34
Vietnam	250	4,371,500	0.01	350	4,503,300	0.01

Table 59 FOB Price of Cassava in selected ASEAN countries

Unit : US$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	Flour	2009	470	480	500	510	520	600	610	650	620	540	520	510	544
		2010	510	530	520	550	540	570	600	650	650	530	530	530	559
		2011	430	450	450	530									465
	Shredded	2009	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
		2010	204	212	246	250	165	NA	NA	176	176	178	NA	301	212
		2011	228	229	238	239	236								234
Philippines	Flour	2009	180	180	240	190	200	270	220	450		160		270	236
		2010	200	210	210	200			220	220		220		208	211
	Pellets	2009	1220	1290	1390	1490	1450	1320	1410	1,140	1,420	1,270	1,200	1,410	1,334
		2010	1320	1150	1170	1440	1410	1320	1290	1500	1,130	1,240	1,600	1,370	1,328
Thailand	Starch	2009	267	250	234	249	260	265	276	275	278	282	293	315	270
		2010	366	379	403	407	435	447	459	524	533	511	523	541	461
		2011	543	553	564										553
	Pellets	2009	178	141	142	265	132	123	115	116	118	123	130	132	143
		2010	140	146	146	150	169	169	169	189	303	217	238	216	188
		2011	236	243	259										246
	Shredded	2009	112	106	114	126	127	127	131	135	139	151	160	167	133
		2010	169	167	183	183	190	195	202	212	219	225	226	234	200
		2011	244	253	269										255

Table 60 CIF Price of Cassava in selected ASEAN countries

Unit : US$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Philippines	Flour	2009	180	180	240	190	200	270	220	450		160		250	234
		2010	200	210	210	200			220	220		220			211
Malaysia	Pellets	2009	496	132	801	469	276	731	2,557	1,136	1,146	701	1,055	3,396	1,075
		2010	1,138	1,316	1,210	1,232	119	119	1,651	1,651	250	1,048	853	1,538	1,010
		2011	991	991											991

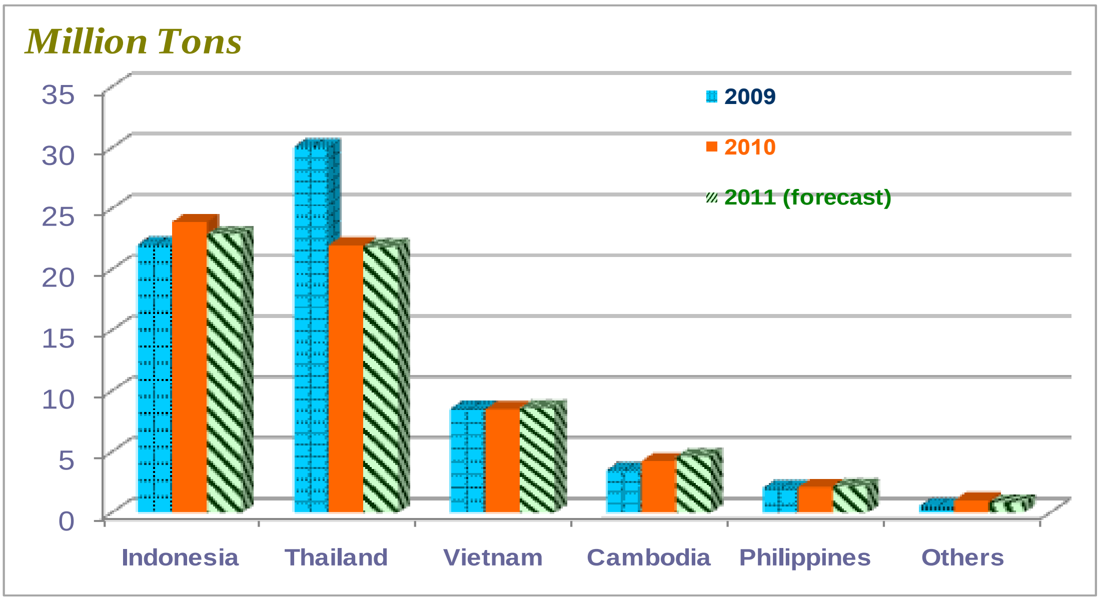


Figure 59 Cassava production of selected countries in ASEAN, 2009-2011

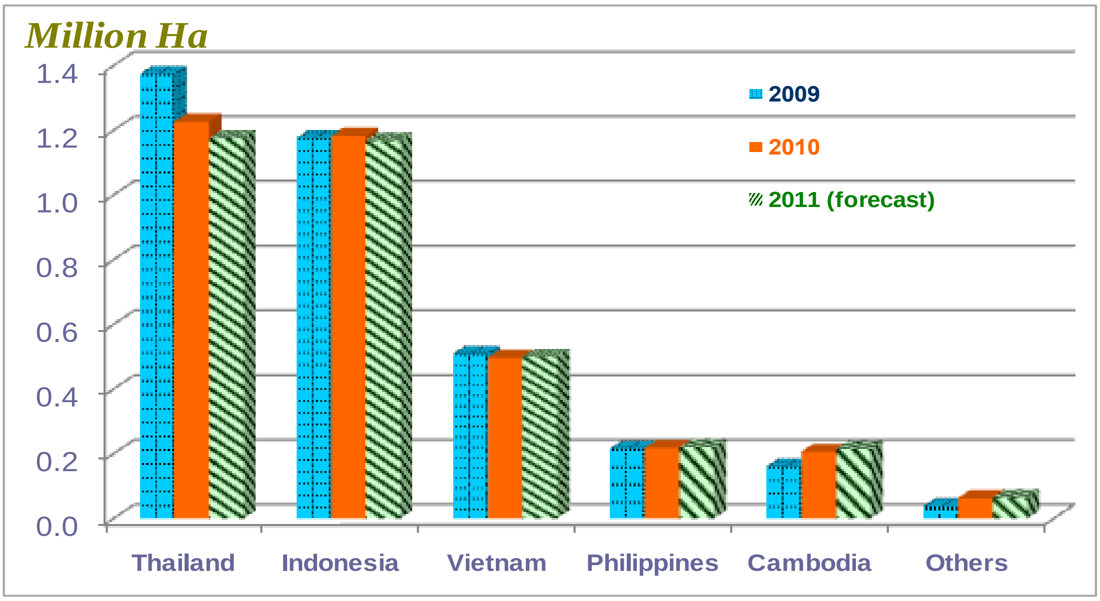


Figure 60 Cassava planted area of selected countries in ASEAN, 2009-2011

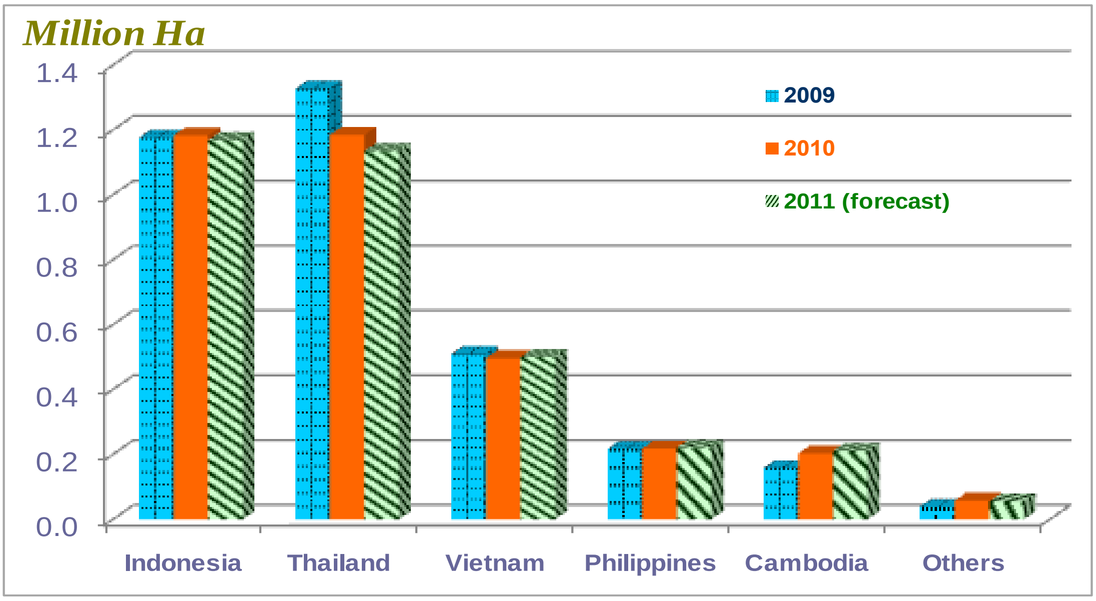


Figure 61 Cassava harvested area of selected countries in ASEAN, 2009-2011

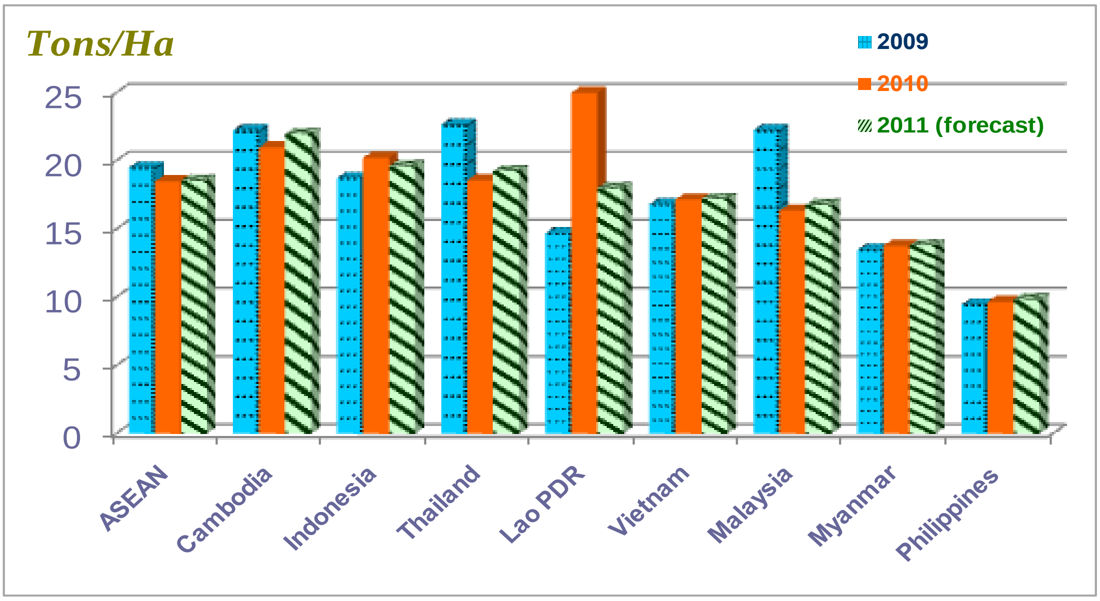


Figure 62 Cassava yield of countries in ASEAN, 2009-2011

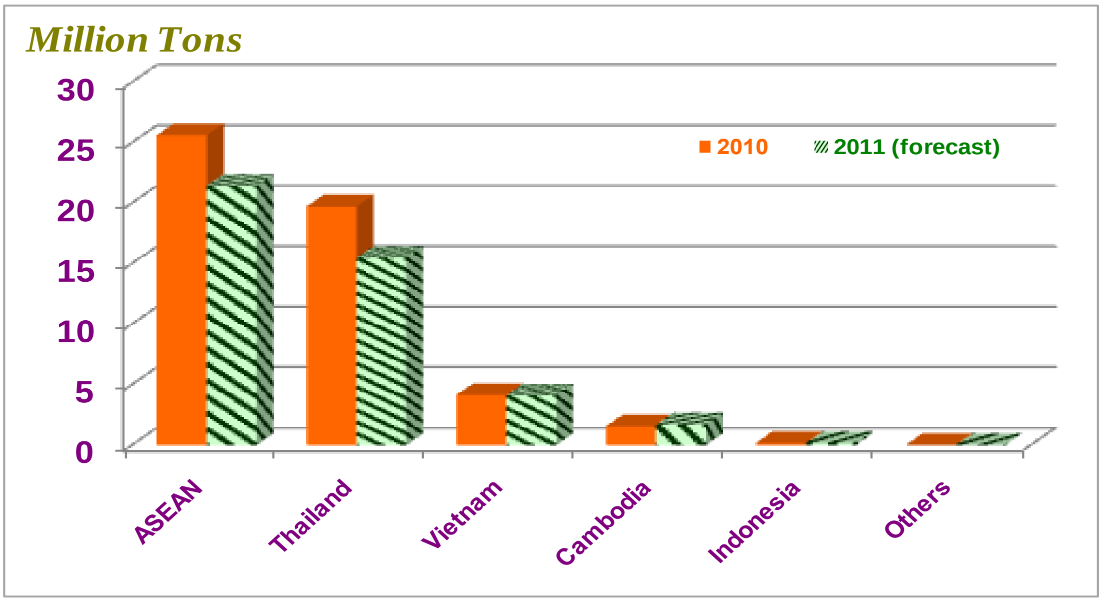


Figure 63 Amount of cassava export (million tons) of selected countries in ASEAN in 2010-2011

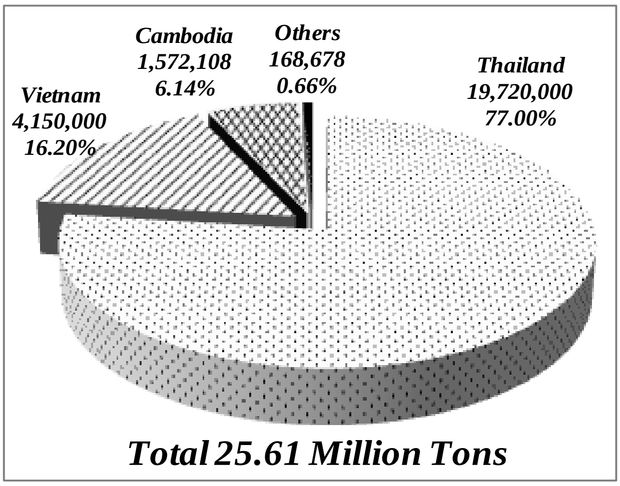


Figure 64 Share of cassava export (tons) among ASEAN countries, 2010

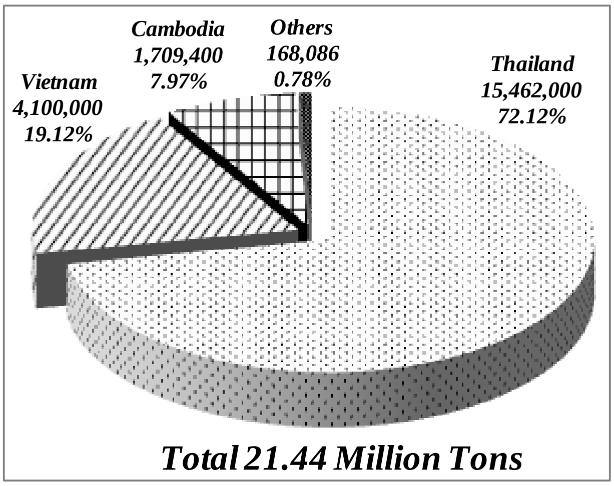


Figure 65 Share of cassava export (tons) among ASEAN countries, 2011

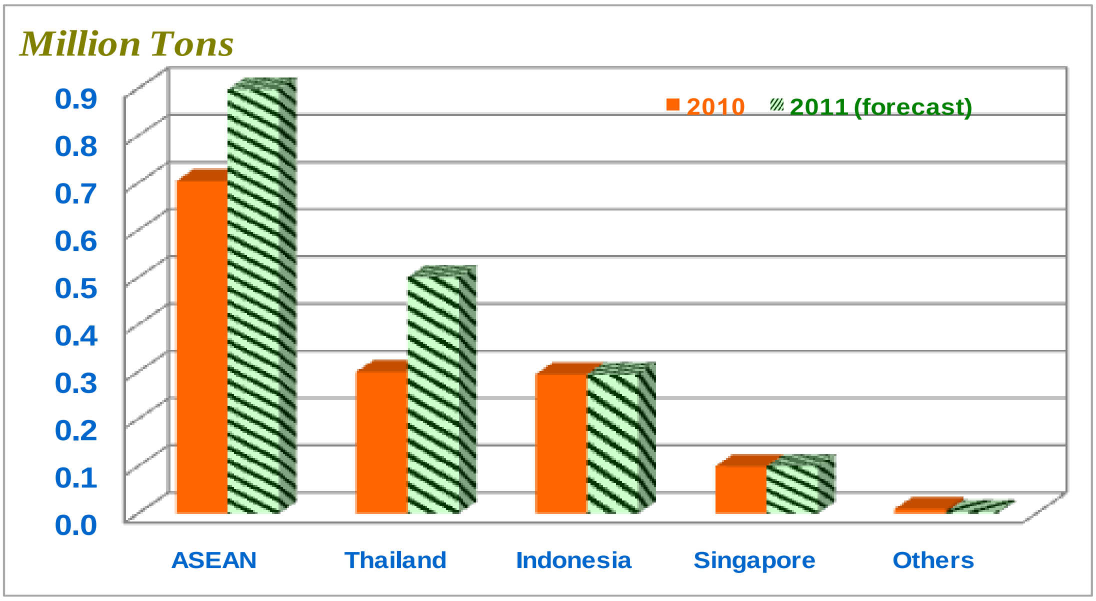


Figure 66 Amount of cassava import (million tons) by selected countries in ASEAN in 2010-2011

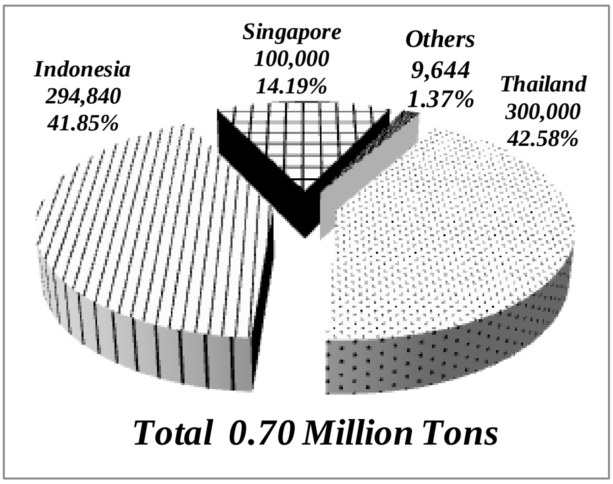


Figure 67 Share of cassava import (tons) among ASEAN countries, 2010

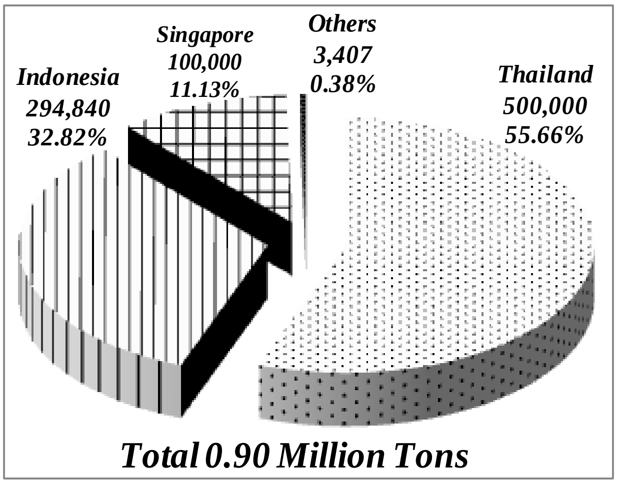


Figure 68 Share of cassava import (tons) among ASEAN countries, 2011

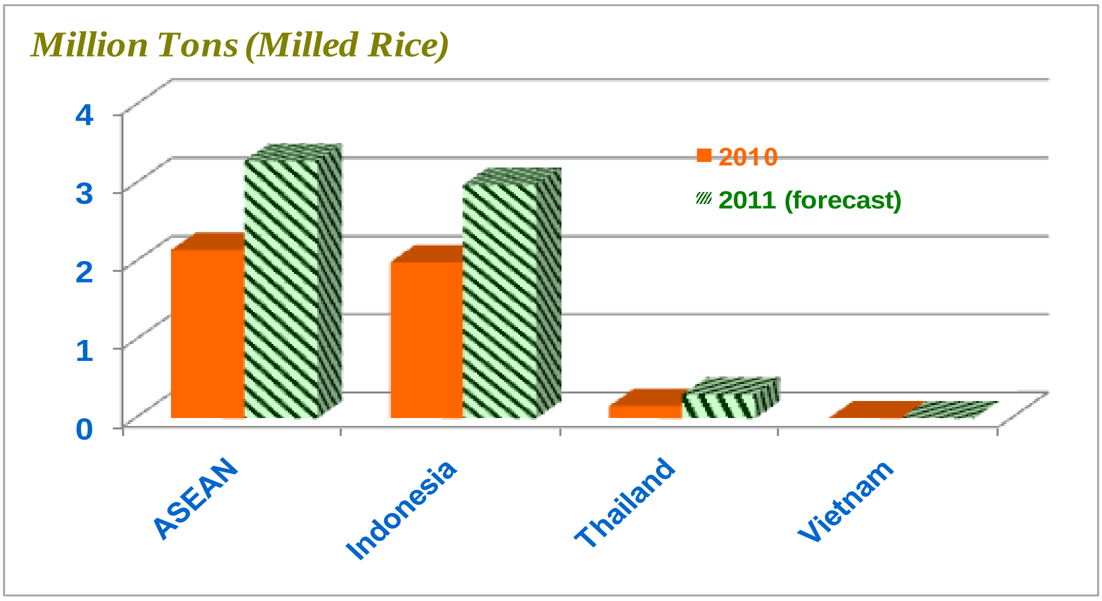


Figure 69 Amount of ending stock of cassava in ASEAN countries

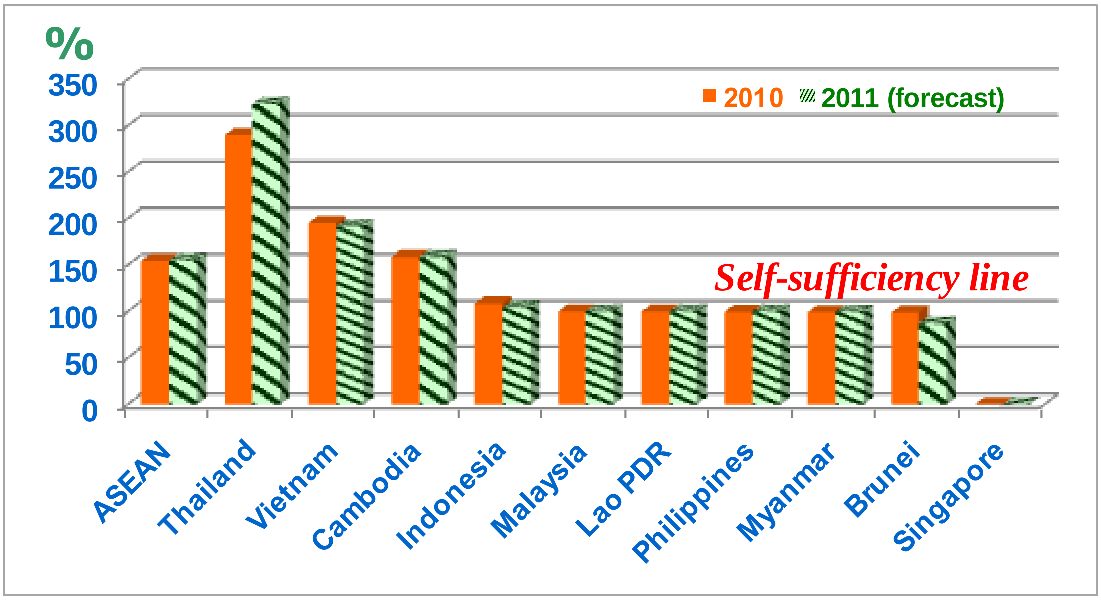


Figure 70 Ratio of cassava production to domestic utilization in ASEAN countries (Self-sufficiency ratio)

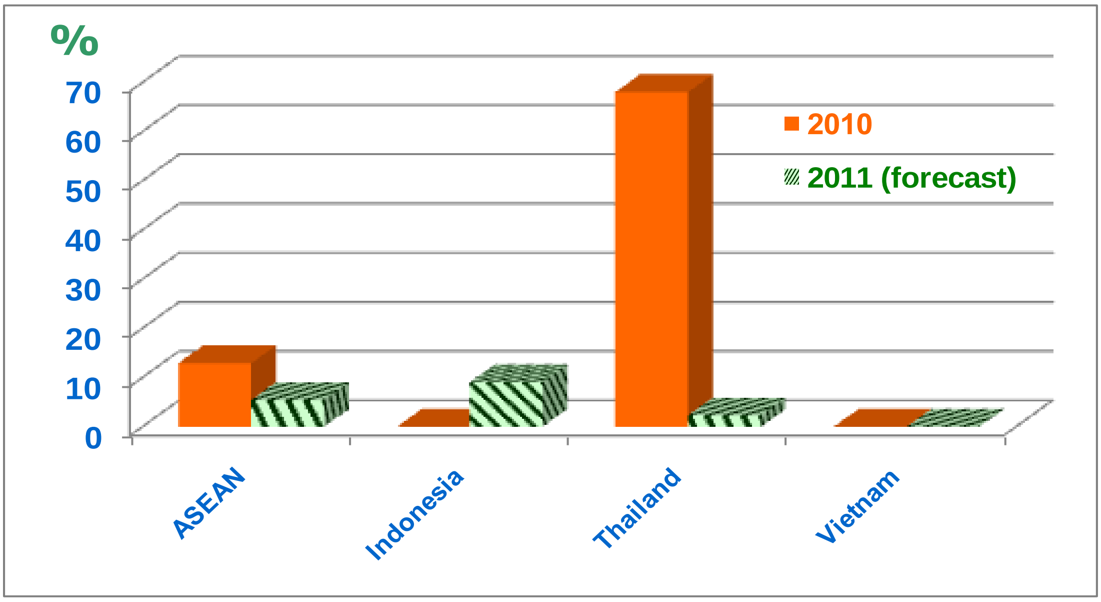


Figure 71 Ratio of cassava beginning stock to domestic utilization in ASEAN countries (Food security ratio)

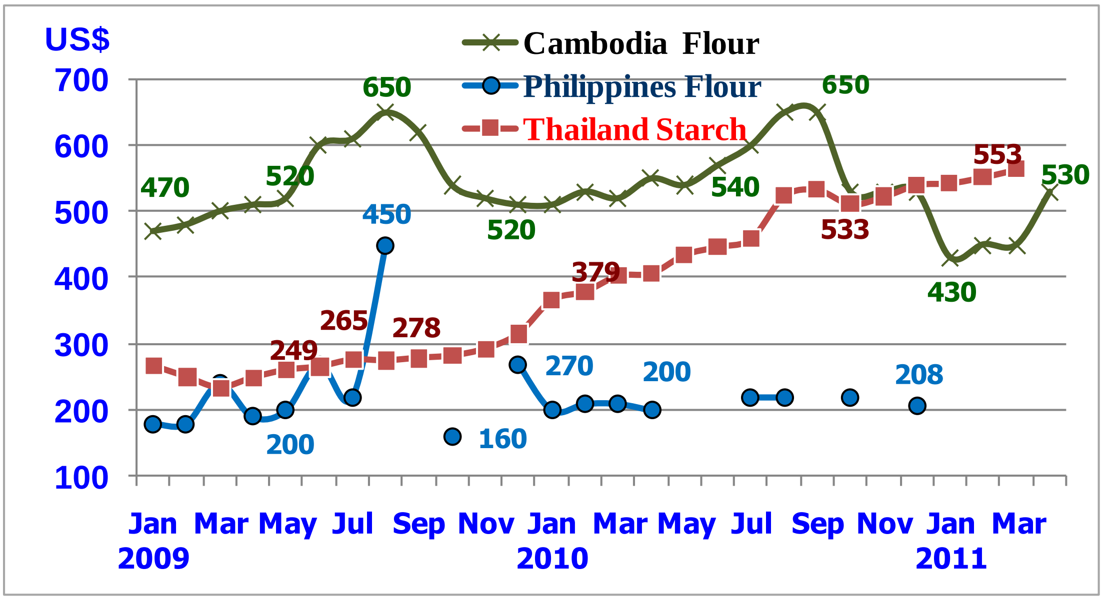


Figure 72 FOB price (US$) of cassava flour of selected countries in ASEAN in 2009-2011

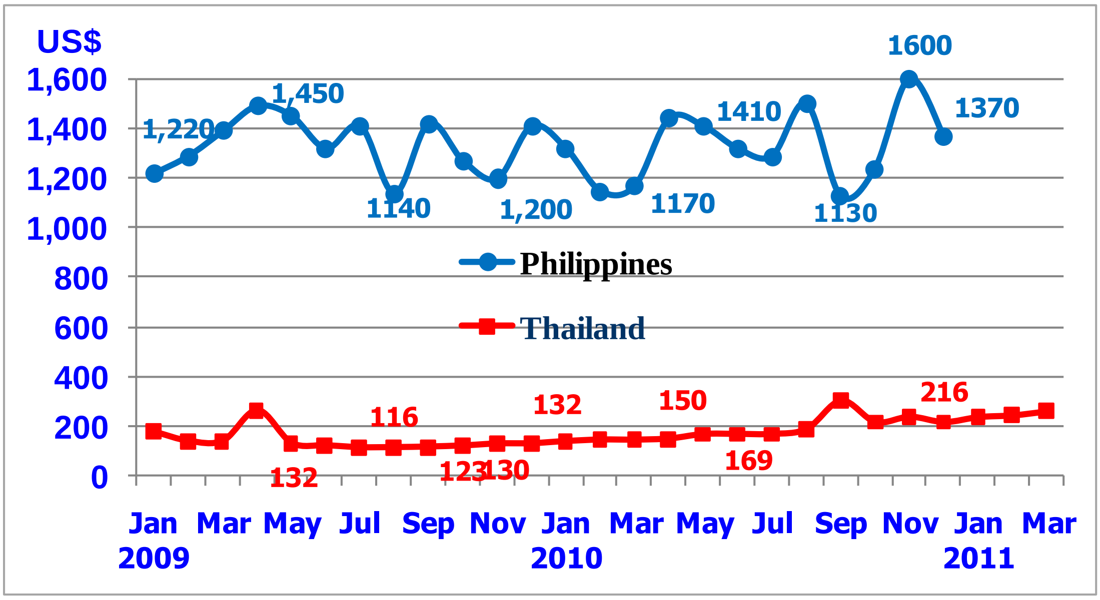


Figure 73 FOB price (US$) of cassava pellets of selected countries in ASEAN in 2009-2011

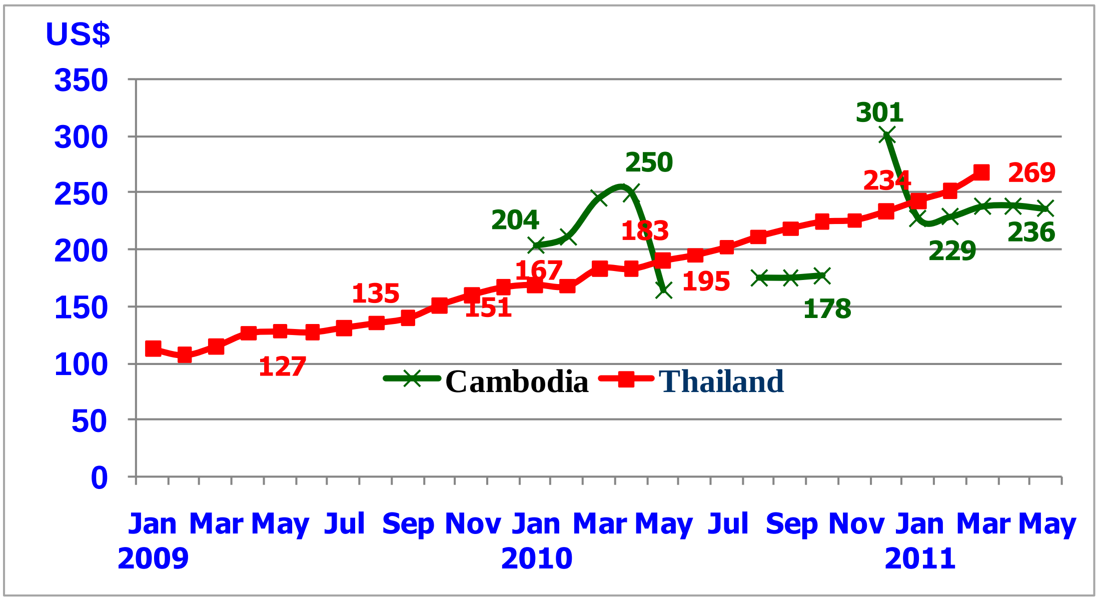


Figure 73 FOB price (US$) of cassava shredded of selected countries in ASEAN in 2009-2011

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 2011.

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:

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

Vietnam:

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

Production of Cassava for 2011

Cambodia:

- The crop harvested during half November to December 2011.

Indonesia:

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

Lao PDR:

- The crop harvested during December 2010 to February 2011.

Myanmar:

- The crop harvested during January to March 2011.

Philippines:

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

Thailand:

- The crop harvested during October 2010 to September 2011.

Vietnam:

- 1^{st} crop harvested during February to March 2011.
- 2^{nd} crop harvested during September to October 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 (2011)

Unit: ton

Country	Paddy	Rice
ASEAN	1	0.632
Brunei	1	0.650
Cambodia	1	0.640
Indonesia	1	0.626
Lao PDR	1	0.561
Malaysia	1	0.633
Myanmar	1	0.627
Philippines	1	0.654
Thailand	1	0.660
Vietnam	1	0.619

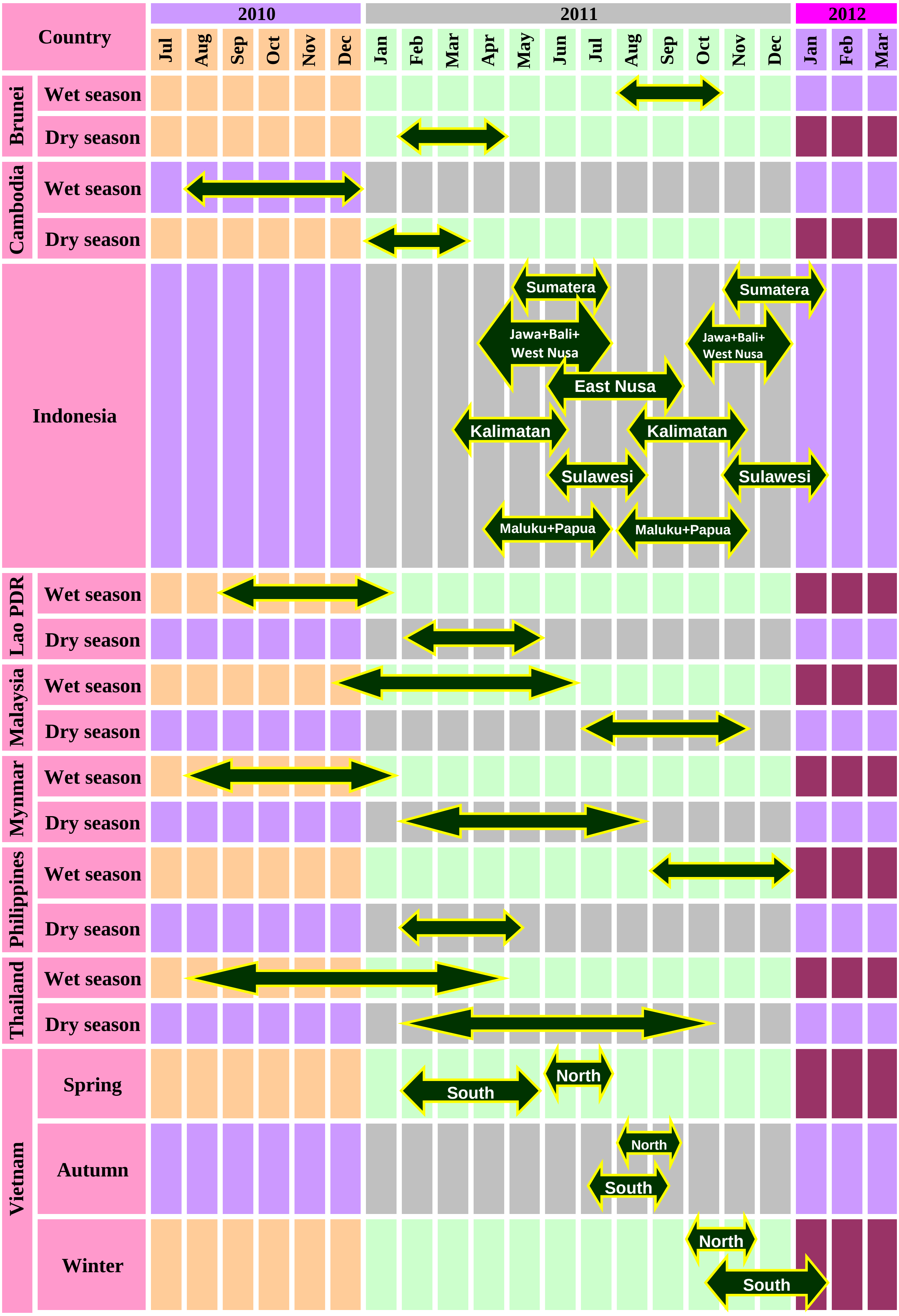
Extraction Rate of Sugar (2011)

Unit: tons

Country	Sugarcane	Sugar
ASEAN	1000	105.384
Cambodia	1000	100.000
Indonesia	1000	153.846
Lao PDR	1000	100.000
Myanmar	1000	100.000
Philippines	1000	102.273
Thailand	1000	100.469
Vietnam	1000	83.333

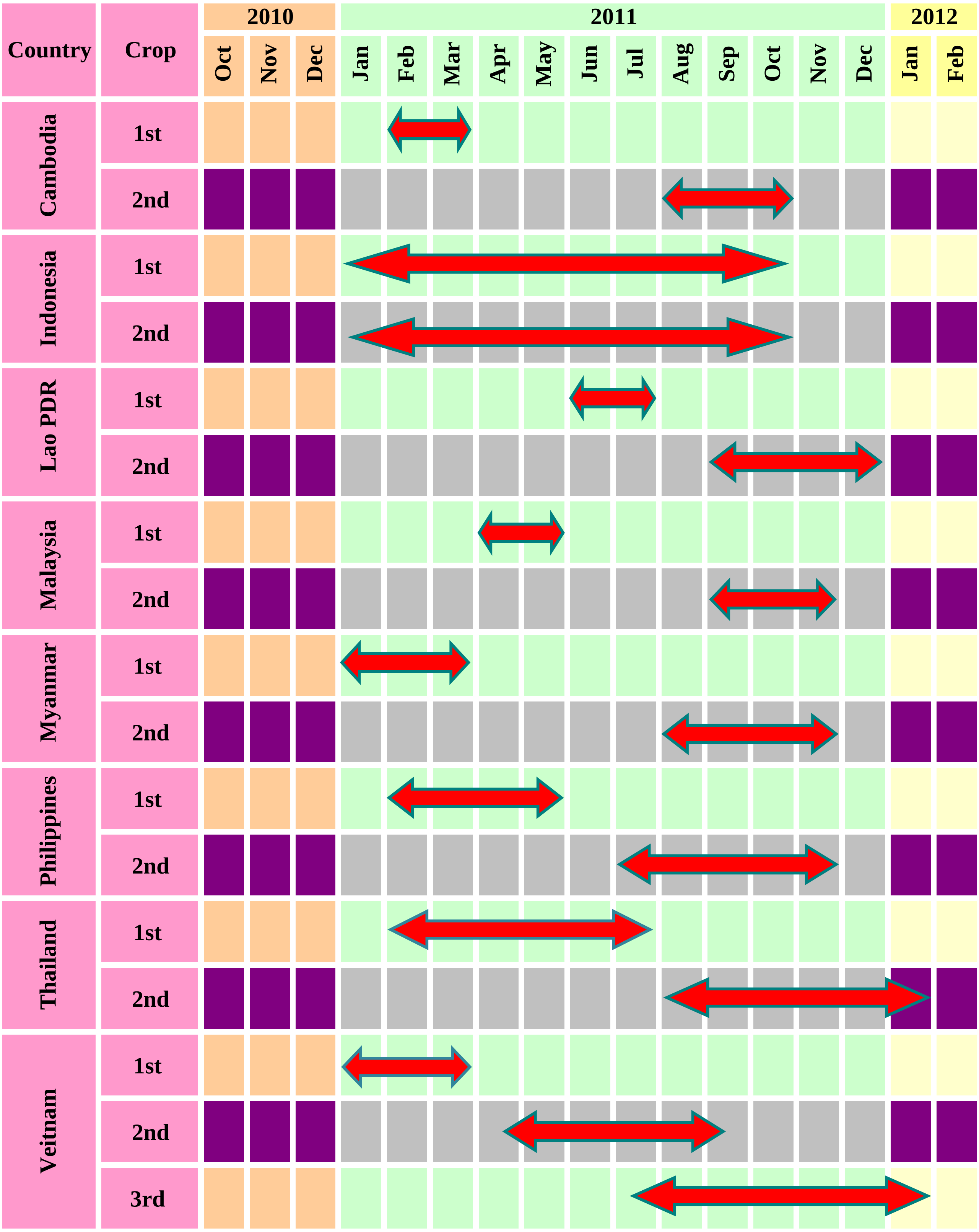
ANNEX 1

Rice crop calendar (harvested months) for crop year 2010/11 (2011) in ACO-6 report



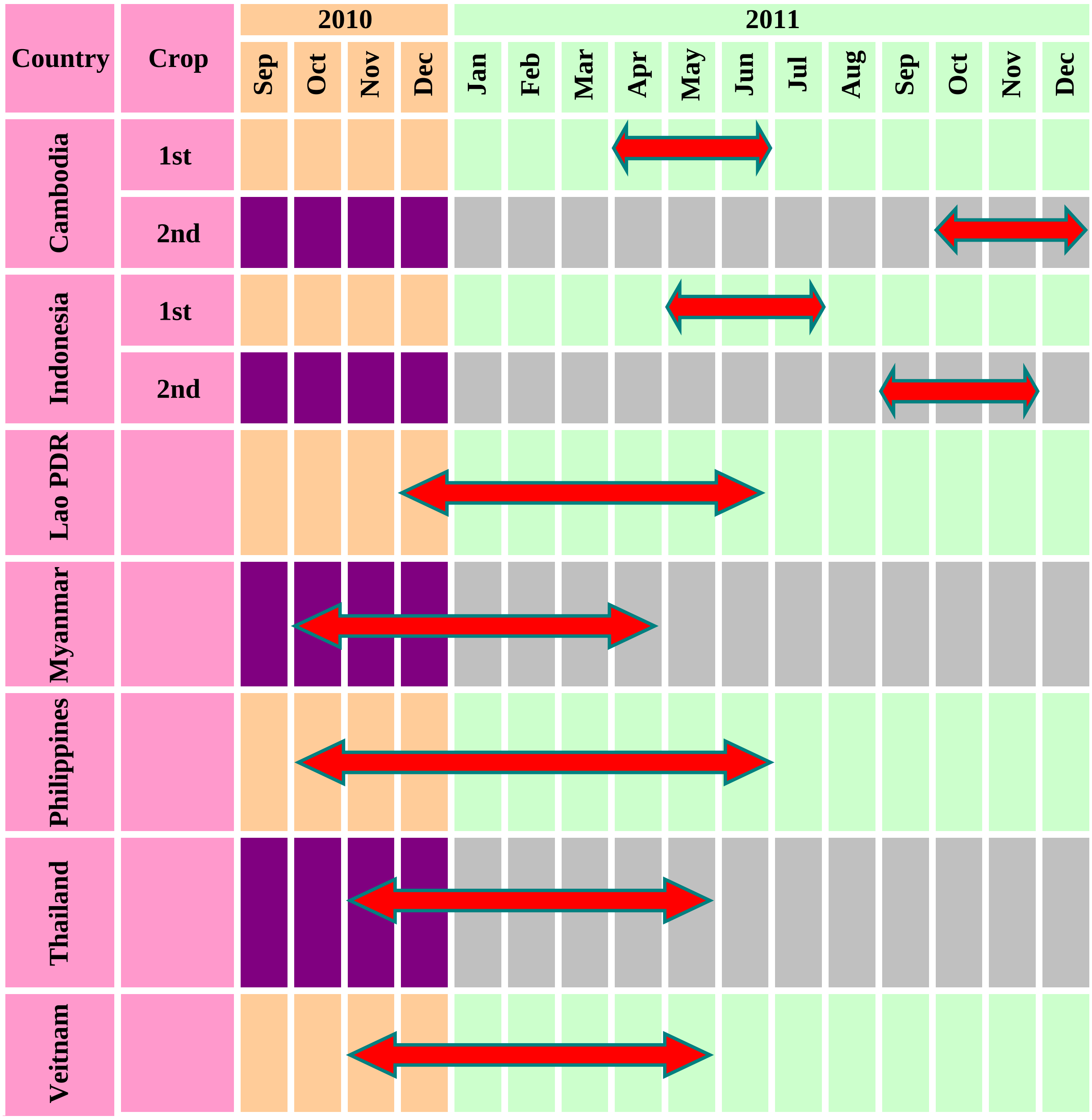
ANNEX 2

Maize **c**rop calendar (harvested months) for crop year 2010/11 (2011) in ACO-6 report



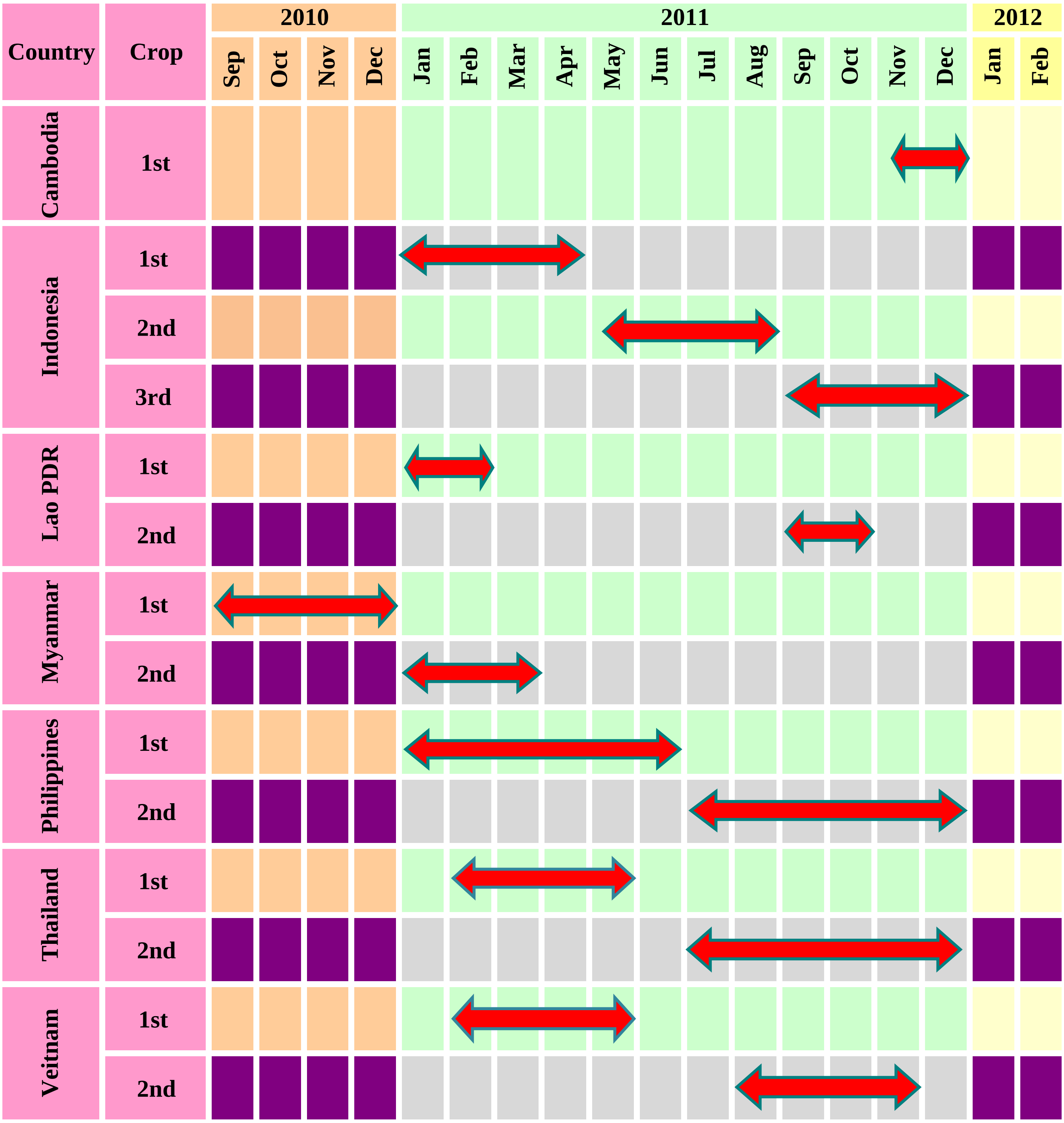
ANNEX 3

Sugarcane crop calendar (harvested months) for crop year 2010/11 (2011) in ACO-6 report



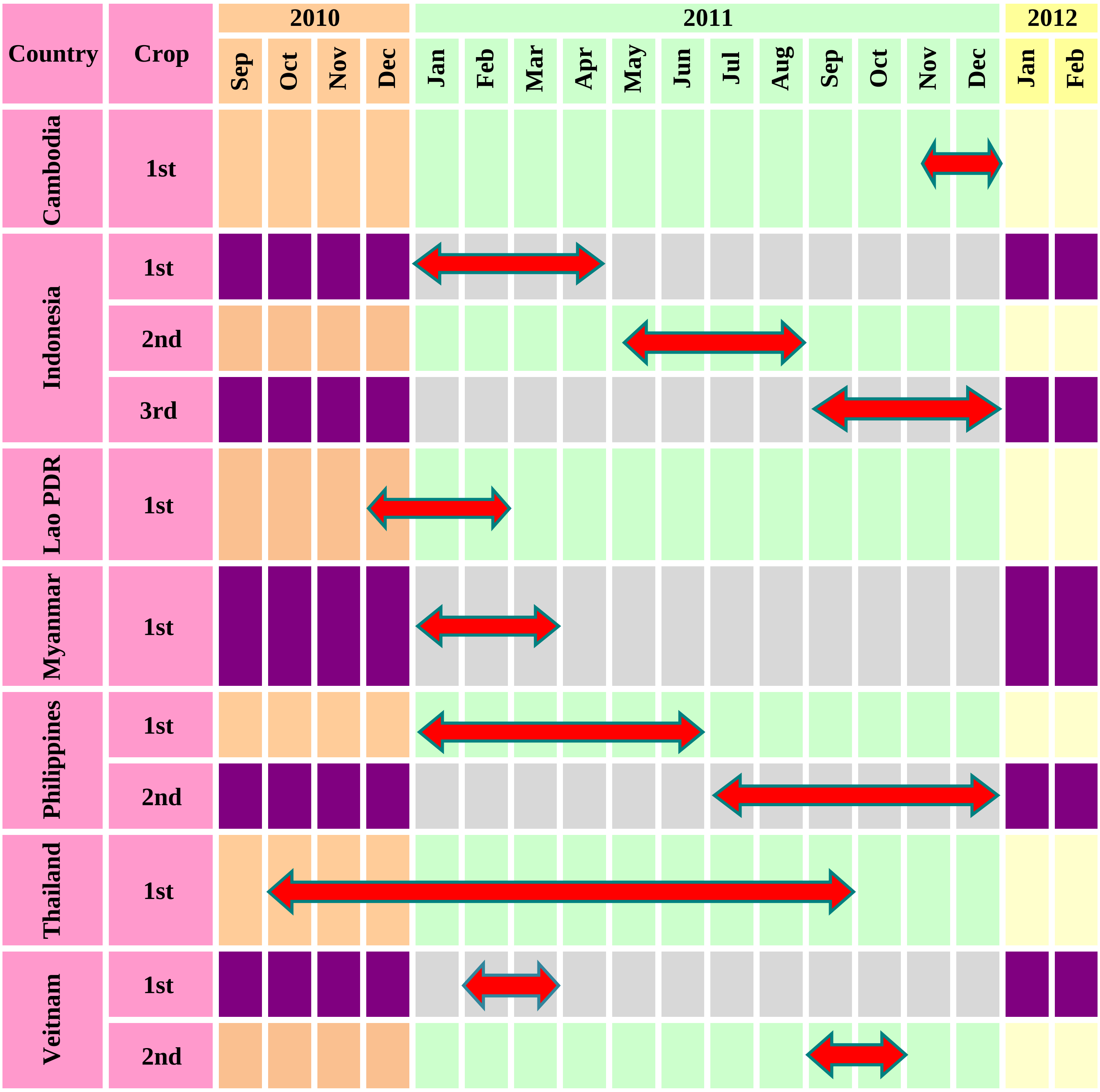
ANNEX 4

Soybean **c**rop calendar (harvested months) for crop year 2010/11 (2011) in ACO-6 report



ANNEX 5

Cassava crop calendar (harvested months) for crop year 2010/11 (2011) in ACO-6 report



ANNEX 6

List of Delegates

The 6th Agricultural Commodity Outlook Committee Meeting

23 – 24 May 2011

	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.	Mr. Haji Mohammad Sufri bin Abdullah	Assistant Director Department of Agriculture and Agrifood Ministry of Industry and Primary Resources Brunei Darussalam
4.	Mr. Haji Muhd Emmy Shamdy Khairul bin Haji Kadir	Agriculture Officer Department of Agriculture and Agrifood Ministry of Industry and Primary Resources Brunei Darussalam
5.	Mr.Tuor Vannak	Deputy Chief of Statistics Office Department of Planning and Statistics Ministry of Agriculture Forestry and Fisheries Cambodia
6.	Dr. Togar Napitupulu	Senior Lecturer Graduate School Binus University Indonesia
7.	Ms. Somsanouk Khounthikoummane	Technical Staff Center for Statistics and Information Department of Planning Ministry of Agriculture and Forestry Lao PDR
8.	Mr. Muhammad Salimi bin Sajari	Undersecretary Ministry of Agriculture and Agro-Based Industry Strategic Planning& International Division Ministry of Agriculture and Agro-Based Industry Malaysia

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.	Mr. Pham Minh Tri	Department Chief Center for Informatics and Statistics Ministry of Agriculture and Rural Development Vietnam
12.	Mr. Ryuki IKEDA	Deputy Director Statistics Planning Division Statistics Department Ministry of Agriculture, Forestry and Fisheries Japan
13.	Mr. Hosaka Masahiro	Section Chief Statistics Planning Division Statistics Department Ministry of Agriculture, Forestry and Fisheries Japan
14.	Dr. Apichart Pongsrihadulchai	AFSIS Consultant Adviser to the Minister Ministry of Agriculture and Cooperatives Thailand