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ASEAN Agricultural Commodity Outlook

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Report on
ASEAN Agricultural Commodity Outlook
No. 8 June 2012

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PREFACE

The Agricultural Commodity Outlook (ACO) Report has published by The ASEAN Food Security Information System (AFSIS) Project 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.

This is the eighth report which contains information of 5 commodities namely, rice, maize, sugarcane soybeans and cassava. The information was mainly derived 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 21-22 May 2012 in Pattaya, Thailand for the provision of additional information and revision of this report. The list of delegates in the meeting is appeared in ANNEX 6.

The AFSIT Center would like to record its appreciation to the Ministry of Agriculture Forestry and Fisheries of Japan, Committee, Focal Point of each Member State, ASIAN Development Bank 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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Highlights of Rice Outlook for 2012

- Even though there were a severe flood occurred in many countries in the region during the crop year 2011/12, rice supply in ASEAN is forecast to slightly decrease only about 2.56 million tons which is less than 2 percent from 154.72 million tons of milled rice in 2011 to 152.16 million tons in 2012. This is because the expansion in area of the second crop is expected especially in Thailand.

- The most declines in production are forecast in Thailand which expected to have a decrease in production about 11 percent from 23.49 million tons of milled rice in 2011 to 20.87 million tons in 2012.

- The rice export from ASEAN is forecast to reduce from 20.67 million tons in 2011 to 18.54 million tons in 2012 due to the expected reduction in export from Thailand.

- The rice import by ASEAN is expected to decrease from 3.80 million tons to 3.66 million tons during the same period. The reduction in import is projected because the Philippines is still has enough stock and has planned to reduce the import in 2012. Indonesia is still the biggest importer in ASEAN in 2012 as in 2011.

- The beginning stock for the whole ASEAN in 2012 is estimated at 22.97 million tons which is about the same as the beginning stock of the previous year.

- The production to domestic utilization ratio for the region is estimated to be 111 percent in 2012 compared with 115 percent in 2011 indicated that ASEAN as a whole is still produced rice enough for regional consumption.

- The beginning stock to domestic utilization ratio is estimated to be about 20 percent in 2012 which is about the same as the previous year. The lowest ratio is forecast in the Indonesia which is equal to about 5 percent.

Table 1 Summary of the ASEAN rice situation, 2011–2012 (milled rice)

Items	2011	2012	Change	
			Quantity	%
Supply (Million tons)	154.72	152.16	-2.56	-1.65
Beginning stock	22.94	22.97	0.03	0.13
Production	127.98	125.53	-2.45	-1.91
Import	3.80	3.66	-0.14	-3.68
Demand (Million tons)	154.72	152.16	-2.56	-1.65
Domestic utilization	111.09	113.06	1.97	1.77
Export	20.67	18.54	-2.13	-10.30
Ending stock	22.97	20.56	-2.41	-10.49
Ratio of production to domestic utilization (%)	115.21	111.03	-4.18	-
Ratio of beginning stock to domestic utilization (%)	20.65	20.32	-0.33	-

ASEAN Rice Situation in 2011

Production

The paddy production in ASEAN in 2011 (crop year 2010/11) was estimated at 205.82 million tons, an increase of 6.19 million tons which is about 3 percent from the previous year (Table 2, Figure 1). This estimate has been revised downward from 206.44 million tons in March 2011 Early Warning Information (EWI) report. On the country by country basis, Indonesia, Lao PDR and Myanmar, the paddy production was estimated to decrease while the other countries in the region the production were estimated to increase. The increase contributed to both the area expansion and the increase in yield.

In Brunei, the increase in production was solely due to the increase in yield which was high enough to compensate the reduction in planted area. The decrease in the area was due to the lack of irrigation system in some districts which is required for the new varieties. The increase in yield was due to the use of new improved varieties, more fertilizer application and the favorable weather (Table 2-5, Figure 1-4).

In Cambodia, the increase in production was due to the increase in both the area planted and the yield. The farmer's response to the increase in paddy price and the favorable weather were the factors induced the area expansion. The increase in yield contributed to the farmers used more improved varieties and applied more fertilizer as well as the favorable weather.

For Indonesia, the reduction in production derived from the decrease in both the planted area and the yield. Even though the planted area of the first (major) crop has increase due to the farmer responded to the paddy price increase, the government policy and favorable weather, the total planted area for the whole year has decreased as a result of the decrease in planted area of the second and the third crops due to the unfavorable weather and the increase in price of competing crops. The decline in average yield came from the first and the second crops due to the pests and disease. The increase in the third crop attributed to the expansion in the area of the improved varieties.

For Lao PDR, the reduction in production was due to the decrease in the harvested area caused by the flood, even though the planted area has increased. The production estimate has revised downward from 3.11 million tons in March 2011 EWI report to 3.06 million tons. The increase in planted area was due to the favorable weather during growing season and the farmer responded to the price increase. The increase in yield was the result of using more improve varieties.

In Malaysia, production has increased due to the increase of the harvested area as well as the yield by 2.19 percent and 2.17 percent respectively. The increase in planted area of the first crop was due to the favorable weather while the increase in the planted area of the second crop was due to the improvement of irrigation system. The increase in the yield came from the increase in the yield of second crop because the farmer taking care their crop better while the yield of the first crop has decreased a little due to the flood, pests and disease. Moreover, Malaysia just launched National Agro Food Policy (2011 – 2020) in January 2012 which aims at ensuring sufficient food supply, making a viable and sustainable agro – food industry and increasing agricultural entrepreneurs income.

In Myanmar, even though the average yield has relatively stable, the production has decreased due to the reduction in planted area. The decline in planted area was due to the unfavorable weather during planted season of the second crop while the planted area of the first crop has slightly increased due to the farmer responded to the paddy price increase.

The crop year 2010/11 was a good year for the Philippines. The production has increased almost 6 percent compared to the previous year. The increase in area was due to the favorable weather as a result of movement of crop calendar to grow rice crop earlier than normal practice and the recovery from the El Niño phenomenon as well as the sufficient water supply for the second crop. The average yield has increased due the increase in yield of the first crop as a result of favorable weather even though the yield of the second crop has declined due to the flood.

Regarding the production estimate in Thailand, the crop year 2010/11 was a good year even though some of the planted area in the first crop had been affected by the flood. The increase in production was due to the increase in both area and yield. The increase in area especially for the second crop was mainly due to the income guarantee scheme of the government combined with the favorable weather. The increase in yield was due to the favorable weather and the better taking care of the crop by the farmers because of the price incentive.

In Vietnam, the estimate production in crop year 2010/11 has increased about 5 percent as a result of the increase in both planted area and yield. There are three rice crops planted in two regions in Vietnam. In the north, the planted area for the first and the third crops has reduced due to the unfavorable weather while the second crop the planted area has increased due to the farmers' response to the price increase. For the south, the planted area of the first and the second crops has increased due to the response of the price increase. For the yield, the average yield has increased 3.01 percent. The increase in the yield has occurred in every crop in all regions due to the increase in the use of improved varieties and the farmers taking care of their crop better as a result of the increase in paddy price.

Utilization and Stock

The utilization of rice within the ASEAN in 2011 (calendar year) was estimated at 111.09 million tons of milled rice, an increase of 0.65 million tons or 0.59 percent from 110.44 million tons in previous year (Table 7). The ratio of total ASEAN production to domestic (within ASEAN) utilization for 2011 was 115.21 percent compared to 112.04 percent in 2010 (Table 9, Figure 12). This indicated that the ASEAN as a whole can produce 15 percent more than the needed consumption within the region. Moreover, the increase in the production to domestic utilization ratio implies that the regional production has increased more than the increase in regional consumption. However, on the country by country basis, Brunei, Indonesia, Malaysia and the Philippines are still not able to produce rice enough for their domestic consumption. However, the deficiency in Indonesia is very small percentage. Singapore imported all rice for domestic consumption and for re-export. The highest production to domestic utilization ratio was found in Thailand, Cambodia and Vietnam respectively.

Regarding the rice stock, the beginning stock in 2011 (calendar year) of ASEAN as a whole was estimated at 22.94 million tons, a decrease of 1.06 million tons or 4 percent compared to 24.00 million tons in 2010. The beginning stock of 2011 has been revised slightly upward from 22.59 million tons in December 2011 ACO report. Thailand, Vietnam, Myanmar and the Philippines carried most of the rice stock in ASEAN. These four countries together have the stock about 86 percent of the overall regional stock. The ratio of the beginning stock to domestic utilization for the whole

region was estimated at 21 percent compared to 22 percent in 2010 (Table 10, Figure 13). Four countries which have the ratio less than 20%, the optimum ratio which is enough for 2-3 months consumption, were Cambodia, Indonesia, Lao PDR, and Singapore.

Trade

In 2011, ASEAN as a whole exported about 20.67 million tons an increase of 2.07 million tons or 11 percent compared to 18.60 million tons in 2010 (Table 7, Figure 5 and 6). Thailand and Vietnam were the two major exporting countries which exported about 10.71 and 7.00 million tons respectively. These two countries together exported about 86 percent of the total ASEAN export and more than half of the world export. Both Thailand and Vietnam has increased their export significantly form 8.94 million tons to 10.71 million tons and from 6.89 million tons to 7.00 million tons respectively. Cambodia are the most rapid increase in export in the region which exported about 1.85 million tons in 2011 compared to 1.70 million in 2010, an increase of about 8.8 percent .

For the import, the whole ASEAN imported about 3.80 million tons in 2011, a decrease from 4.25 million tons in 2010. Indonesia imported 1.62 million tons or 43 percent of total import (Table 7, Figure 8 and 9). The second and third largest importing countries in 2011 were Malaysia and the Philippines which imported about 1.03 and 0.71 million ton respectively.

The quantity and value of rice export by countries of destination and the quantity and value of import by countries of origin are given in table 11 and 12.

Prices

Monthly FOB prices of rice export and CIF prices of rice import in selected ASEAN countries during 2009-2012 are shown in Table 14 - 15 respectively.

The annual average of FOB prices of 5 % rice in 2011 for Thailand is higher than in 2010 (Table 14, Figure 14 and 15). This is the same situation for Vietnam and Cambodia. The prices of 5% rice for Cambodia in 2011 is highest followed by Thailand and Vietnam respectively

For import, the average CIF prices of 5% rice in the year 2011 for the Philippines was US$ 521 per metric ton which is lower than US$ 712 per metric ton in 2010 (Table 15, Figure 14 and 16).

Damaged Area

The damaged area of rice for the whole ASEAN in 2011 (crop year 2010/11) was reported to be about 1 million hectares. The flood contributed the most of the damage and followed by the drought and the pests respectively. The most affected area caused by the flood has occurred in Thailand as well as the drought. The second and the third country affected by the flood were Lao PDR, the Philippines and Myanmar respectively (Table 6).

Prospects for Rice in 2012

Production

Paddy production in ASEAN in 2012 (crop year 2011/12) is forecast to be about 202.72 million tons, a decrease of 3.10 million tons or 1.51 percent compared to 205.82 million tons in 2011. The most reduction is forecast in Thailand which is estimated to lost about 4 million tons or about 11 percent compared to the previous year due to the severe flood during the wet season of 2011/12 crop. However the lost in production during the first (major) crop was compensated by the increase of the second (dry season) crop. Myanmar is forecast to have a decline in production about 10.55 percent. For Vietnam the production forecast for 2012 is less than one percent lower than in 2011. For other countries, the production for 2012 is forecast to be increased (Table 2).

Utilization and Stock

The domestic utilization in ASEAN in 2012 is forecast to be 113.06 million tons, an increase of about 1.97 million tons or about 2 percent compared to 111.09 million tons in 2011 (Table 7 and 8).

The beginning stock in 2012 is estimated to be about 22.97 million tons which is less than 1 percent higher than in 2011. The ending stock in 2012 is forecast to be about 20.56 million tons which is about 10 percent lower than in 2011. The decrease in ending stock is due to the reduction in production and the increase in the domestic utilization.

The ratio of production to domestic utilization is forecast to decrease from 115 percent in 2011 to 111 percent in 2012 (Table 9, Figure 12). Even though the ratio of production to domestic utilization is expected to reduce, the ASEAN as a whole is still produced about 11 percent more than the required consumption within the ASEAN.

The ratio of the beginning stock in 2012 to domestic utilization in the same year is forecast to be about 20 percent which is, in general, appropriate for the region and

about the same value as in 2011 (Table 10, Figure 13). However, there are four countries namely, Indonesia, Lao PDR, Myanmar and Singapore that have the ratio less than 20 percent.

Trade

Rice export from ASEAN is forecast to reduce form 20.67 million tons in 2011 to about 18.54 million tons in 2012 (Table 7 and 8, Figure 5 and 7). The decline in regional export is mainly come from the expected reduction in export from Thailand due to the high price under the rice mortgage scheme of the government that may lead to the higher export price.

For the import, the whole ASEAN is forecast to import about 3.66 million tons in 2012, a reduction of about 0.14 million tons or about 4 percent as compared to 2011 due to the decline in the import of the Philippines (Table 7 and 8, Figure 8 and 10).

Table 2 Paddy production in ASEAN countries, 2010–2012

Unit: 1,000 Tons

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	199,634.28	205,821.59	6,187.30	3.10	202,718.01	-3,103.58	-1.51
Brunei	1.65	2.15	0.50	30.10	2.25	0.11	4.90
Cambodia	7,585.87	8,249.45	663.58	8.75	8,779.37	529.92	6.42
Indonesia	66,469.39	65,740.95	-728.45	-1.10	68,338.36	2,597.41	3.95
Lao PDR	3,070.64	3,062.24	-8.40	-0.27	3,551.90	489.67	15.99
Malaysia	2,464.83	2,575.99	111.16	4.51	2,750.41	174.42	6.77
Myanmar	32,165.12	32,064.43	-100.69	-0.31	28,680.58	-3,383.85	-10.55
Philippines	15,772.32	16,684.06	911.74	5.78	17,473.89	789.83	4.73
Singapore	-	-	-	-	-	-	-
Thailand	32,116.06	35,583.63	3,467.57	10.80	31,625.25	-3,958.38	-11.12
Vietnam	39,988.40	41,858.70	1,870.30	4.68	41,516.00	-342.70	-0.82

Table 3 Paddy planted area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	49,365.89	50,859.44	1,493.55	3.03	50,800.48	-58.96	-0.12
Brunei	1.85	1.64	-0.21	-11.12	1.84	0.19	11.72
Cambodia	2,720.38	2,795.90	75.52	2.78	3,033.98	238.08	8.52
Indonesia	13,376.49	13,239.64	-136.85	-1.02	13,611.56	371.92	2.81
Lao PDR	899.45	914.54	15.09	1.68	935.00	20.46	2.24
Malaysia	677.88	687.52	9.63	1.42	687.30	-0.22	-0.03
Myanmar	8,066.65	8,047.28	-19.37	-0.24	7,592.76	-454.52	-5.65
Philippines	4,473.69	4,626.81	153.12	3.42	4,645.64	18.83	0.41
Singapore	-	-	-	-	-	-	-
Thailand	11,635.19	12,908.22	1,273.02	10.94	12,602.41	-305.81	-2.37
Vietnam	7,514.30	7,637.90	123.60	1.64	7,690.00	52.10	0.68

Table 4 Paddy harvested area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	48,521.37	49,786.18	1,264.81	2.61	49,630.22	-155.96	-0.31
Brunei	1.56	1.52	-0.04	-2.67	1.60	0.09	5.68
Cambodia	2,674.60	2,777.32	102.72	3.84	2,766.61	-10.71	-0.39
Indonesia	13,253.45	13,201.32	-52.13	-0.39	13,599.76	398.45	3.02
Lao PDR	855.11	817.25	-37.87	-4.43	935.00	117.75	14.41
Malaysia	668.58	683.23	14.65	2.19	684.30	1.06	0.16
Myanmar	8,058.15	8,011.48	-46.67	-0.58	7,567.02	-444.46	-5.55
Philippines	4,354.16	4,536.64	182.48	4.19	4,645.22	108.58	2.39
Singapore	-	-	-	-	-	-	-
Thailand	11,141.45	12,119.52	978.07	8.78	11,740.70	-378.82	-3.13
Vietnam	7,514.30	7,637.90	123.60	1.64	7,690.00	52.10	0.68

Note: Vietnam reported only planted area.

Table 5 Paddy yield in ASEAN countries, 2010–2012

Unit: Ton/Hectare

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	4.11	4.13	0.02	0.49	4.08	-0.05	-1.21
Brunei	1.06	1.41	0.35	33.02	1.40	-0.01	-0.71
Cambodia	2.84	2.97	0.13	4.58	3.17	0.20	6.73
Indonesia	5.02	4.98	-0.04	-0.80	5.02	0.04	0.80
Lao PDR	3.59	3.75	0.16	4.46	3.80	0.05	1.33
Malaysia	3.69	3.77	0.08	2.17	4.02	0.25	6.63
Myanmar	3.99	4.00	0.01	0.25	3.79	-0.21	-5.25
Philippines	3.62	3.68	0.06	1.66	3.76	0.08	2.17
Singapore	-	-	-	-	-	-	-
Thailand	2.88	2.94	0.06	2.08	2.69	-0.25	-8.50
Vietnam	5.32	5.48	0.16	3.01	5.40	-0.08	-1.46

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

Table 6 Paddy damaged area in ASEAN by cause of damage, 2011

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecifi ed	Total
ASEAN	935,073	45,805	40,750	1,814	1,276	48,536	1,073,255
Brunei	21	20	40	44	0	0	125
Cambodia	15,062	3,258	249	-	-	-	18,569
Indonesia	0	0	38,323	0	0	0	38,323
Lao PDR	96,739	155	352	0	44	0	97,290
Malaysia	718	0	1,016	1,770	0	777	4,282
Myanmar	34,574	0	0	0	1,232	0	35,806
Philippines	89,396	0	770	0	0	0	90,166
Singapore	0	0	0	0	0	0	-
Thailand	698,563	42,372	0	0	0	47,759	788,694
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Note: For Indonesia cause of damage is total of pest and diseases.

Table 7 Rice balance sheet of ASEAN countries, 2011 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	22,943,520	127,976,542	3,801,965	154,722,028	111,085,354	20,665,145	22,971,058	154,721,557
Brunei	15,885	1,394	31,056	48,336	33,626	0	14,710	48,336
Cambodia	516,633	5,279,649	0	5,796,282	3,035,913	1,847,877	912,492	5,796,282
Indonesia	1,637,688	38,408,154	1,620,000	41,665,842	39,682,309	1,000	1,982,062	41,665,371
Lao PDR	259,919	1,936,458	58,481	2,254,858	1,828,433	25,234	401,191	2,254,858
Malaysia	775,473	1,661,512	1,031,389	3,468,374	2,510,669	0	957,705	3,468,374
Myanmar	4,009,117	20,357,372	0	24,366,489	19,752,537	1,000,000	3,613,952	24,366,489
Philippines	3,424,300	10,911,376	706,583	15,042,259	12,414,463	396	2,627,400	15,042,259
Singapore	50,000	-	354,456	404,456	275,347	84,409	44,700	404,456
Thailand	7,913,318	23,485,199	nil	31,398,517	12,084,000	10,706,229	8,608,288	31,398,517
Vietnam	4,341,187	25,935,428	0	30,276,615	19,468,057	7,000,000	3,808,558	30,276,615

Note: nil = very small amount

Table 8 Rice balance sheet of ASEAN countries, 2012 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	22,971,059	125,531,202	3,660,663	152,162,924	113,060,181	18,544,295	20,558,448	152,162,924
Brunei	14,710	1,463	31,988	48,161	34,662	0	13,499	48,161
Cambodia	912,492	5,618,794	0	6,531,286	3,302,498	1,948,412	1,280,376	6,531,286
Indonesia	1,982,062	39,925,652	1,620,000	43,527,714	41,216,303	1,000	2,310,411	43,527,714
Lao PDR	401,191	2,131,200	15,383	2,547,774	2,105,304	20,883	421,587	2,547,774
Malaysia	957,706	1,774,011	1,143,292	3,875,009	2,552,445	0	1,322,564	3,875,009
Myanmar	3,613,952	18,103,183	0	21,717,135	19,532,052	789,000	1,396,083	21,717,135
Philippines	2,627,400	11,427,925	500,000	14,555,325	12,682,210	0	1,873,115	14,555,325
Singapore1/	44,700	-	350,000	394,700	270,000	85,000	39,700	394,700
Thailand	8,608,288	20,872,665	nil	29,480,953	13,177,000	8,500,000	7,803,953	29,480,953
Vietnam	3,808,558	25,676,309	0	29,484,867	18,187,707	7,200,000	4,097,160	29,484,867

Note: 1/ The value is estimated by AFSIS Project, nil = very small amount and the value of 2012 is forecasting value

Table 9 Ratio of rice production to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	123,729,893	110,437,262	112.04	127,976,542	111,085,354	115.21	125,531,202	113,060,181	111.03
Brunei	1,072	32,365	3.31	1,394	33,626	4.15	1,463	34,662	4.22
Cambodia	4,854,957	2,961,392	163.94	5,279,649	3,035,913	173.91	5,618,794	3,302,498	170.14
Indonesia	38,833,738	40,209,860	96.58	38,408,154	39,682,309	96.79	39,925,652	41,216,303	96.87
Lao PDR	1,886,880	1,747,787	107.96	1,936,458	1,828,433	105.91	2,131,200	2,105,304	101.23
Malaysia	1,589,816	2,470,558	64.35	1,661,512	2,510,669	66.18	1,774,011	2,552,445	69.50
Myanmar	20,311,437	19,592,784	103.67	20,357,372	19,752,537	103.06	18,103,183	19,532,052	92.68
Philippines	10,315,097	11,897,714	86.70	10,911,376	12,414,463	87.89	11,427,925	12,682,210	90.11
Singapore	–	208,716	–	–	275,347	–	0	270,000	–
Thailand	21,196,602	12,046,000	175.96	23,485,199	12,084,000	194.35	20,872,665	13,177,000	158.40
Vietnam	24,740,294	19,270,086	128.39	25,935,428	19,468,057	133.22	25,676,309	18,187,707	141.17

Table 10 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	24,002,115	110,437,262	21.73	22,943,520	111,085,354	20.65	22,971,059	113,060,181	20.32
Brunei	18,628	32,365	57.56	15,885	33,626	47.24	14,710	34,662	42.44
Cambodia	322,303	2,961,392	10.88	516,633	3,035,913	17.02	912,492	3,302,498	27.63
Indonesia	2,376,810	40,209,860	5.91	1,637,688	39,682,309	4.13	1,982,062	41,216,303	4.81
Lao PDR	139,510	1,747,787	7.98	259,919	1,828,433	14.22	401,191	2,105,304	19.06
Malaysia	725,775	2,470,558	29.38	775,473	2,510,669	30.89	957,706	2,552,445	37.52
Myanmar	4,290,464	19,592,784	21.90	4,009,117	19,752,537	20.30	3,613,952	19,532,052	18.50
Philippines	2,629,100	11,897,714	22.10	3,424,300	12,414,463	27.58	2,627,400	12,682,210	20.72
Singapore	40,000	208,716	19.16	50,000	275,347	18.16	44,700	270,000	16.56
Thailand	7,702,346	12,046,000	63.94	7,913,318	12,084,000	65.49	8,608,288	13,177,000	65.33
Vietnam	5,757,179	19,270,086	29.88	4,341,187	19,468,057	22.30	3,808,558	18,187,707	20.94

Table 11 Quantity and Value of Rice Export by Countries of Destination in 2011

Quantity: Tons Values: US$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia														
Lao PDR														
Malaysia														
Myanmar														
Philippines					33	427,100					1	3,050		
Singapore	120	224,096	70	53,012	76,786	44,165,462			5,059	5,967,871			651	334,940
Thailand	32,805	34,157,927	8,210	2,792,161	901,308	478,610,358	21,996	9,185,616	330,932	197,903,151	1,799	897,705	185,966	92,326,838
Vietnam	1,621	9,649,986			1,882,971	1,019,301,068			530,433	292,092,027			975,144	476,320,359

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	140	213,252					140	213,252	707	526,756	847	740,008
Lao PDR					22,161	1,030,898	22,161	1,030,898	3,073	1,886,283	25,234	2,917,181
Malaysia												
Myanmar												
Philippines					39	192,000	73	622,150	323	1,539,843	396	2,161,993
Singapore			529	423,293	3	8,835	83,145	51,115,662	1,191	1,173,495	84,336	52,289,157
Thailand	184,886	159,381,710			4,186	3,123,492	1,672,089	978,378,958	9,034,140	5,452,868,939	10,706,229	6,431,247,897
Vietnam	385,957	197,908,212					3,776,126	1,995,271,652	3,337,651	1,661,534,886	7,113,777	3,656,806,538

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 12 Quantity and Value of Rice Import by Countries of Origin in 2011

Quantity: Tons Values: US$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									5	3,940	1,140	419,240	52	423,425
Lao PDR														
Malaysia			10,885	9,463,941	17	19,627					1,625	719,670		
Myanmar														
Philippines									4,115	1,943,782				
Singapore			423	388,000	292	409,000			38	63,000	8,190	3,434,000		
Thailand			0.01	88			33	21,177			0.02	154	0.10	212
Vietnam														

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei			28,551				28,551				28,551	
Cambodia												
Indonesia	1,506	981,899	937,453	531,730,219	1,773,250	943,747,489	2,713,406	1,477,306,212	30,855	31,951,202	2,744,261	1,509,257,414
Lao PDR			32,533	3,724,780	10,819	2,354,203	43,352	6,078,983	15,129	7,371,350	58,481	13,450,333
Malaysia	345	297,694	325,708	202,188,731	550,597	300,413,706	889,177	513,103,369	142,212	83,539,158	1,031,389	596,642,527
Myanmar												
Philippines	1,510	1,020,473	118,069	62,519,971	580,123	307,671,969	703,817	373,156,195	2,765	10,047,230	706,583	383,203,425
Singapore			181,092	163,119,000	93,771	55,626,000	283,806	223,039,000	70,650	59,192,000	354,456	282,231,000
Thailand	1	1,365			0.01	647	34	23,643	2,003	2,393	2,037	26,036
Vietnam												

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 13 FOB Price of rice in selected ASEAN countries

Unit: US$/Tons

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	Milled Rice 5%	2009	404	510	515	760	828	897	796	725	738	666	702	684	685
		2010	541	550	535	560	555	650	590	540	560	650	700	710	595
		2011	535	560	550	570	565	660	593	550	565	670	710	725	604
		2012	566	630	600	566	650								602
Thailand	Hommali Rice	2009	865	862	865	876	887	901	941	956	1,013	1,045	1,063	1,062	945
		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	976	990	1,059	1,077	1,070	1,123	1,169	1,107	1,039
		2012	1,055	1,081	1,081	1,058	1,056								1,066
	Milled Rice 5%	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	483	502	539	568	556	604	633	595	545
		2012	531	549	549	552	592								555
Vietnam	Milled Rice 5%	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	500	470	488	481	497	517	557	571	598		517
Myanmar	Milled Rice 25%	2009	288	283	286	283	298	318	311	320	311	305	314	321	303
		2010	330	336	351	345	346	340	337	331	333	339	366	385	345
		2011	379	381	386	393	394	392	376	394	396	385	388	387	388
		2012	383	353											368
Indonesia	Glutinous Rice	2009	309	724		581	545	716	500	757	800	993		1,104	703
		2010	1,336	237	322	736	680	219	786	839	1,200	676	1,441	1,427	825
		2011	627	715	1,327	1,472	580	831	2,140	6,804	1,597	1,497	3,012	2,326	1,911

Table 14 CIF Price of rice in selected ASEAN countries

Unit: US$/Tons

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Philippines	Philippines Milled Rice 5%	2010	646	703	743	713	699	683	736	770					712
		2011				466	560	534	500	509	554				521
	Philippines Rice 10%-25%	2010	365	676		462		448	422	659	371				486
		2011		626		620	517	459	508	512	641	555			555
	Broken rice	2010			546	481	375		448						463
		2011						353	639	530	656		541	483	534
Malaysia	Malaysia Fragrant Rice	2009	484	503	524	487	492	555	510	522	478	616	539	481	516
		2010	538	553	545	488	545	476	495	534	600	479	588	660	542
		2011	438	506	540	560	593	584	537	547	552	541	578	711	557
		2012	696												
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	759	747	776	744	772	814	841	864	798
Indonesia	Not specified	2010	682	586	594	523	560	329	521	490	674	590	521	519	549
		2011	545	532	503	524	579	563	619	589	549	549	605	603	563

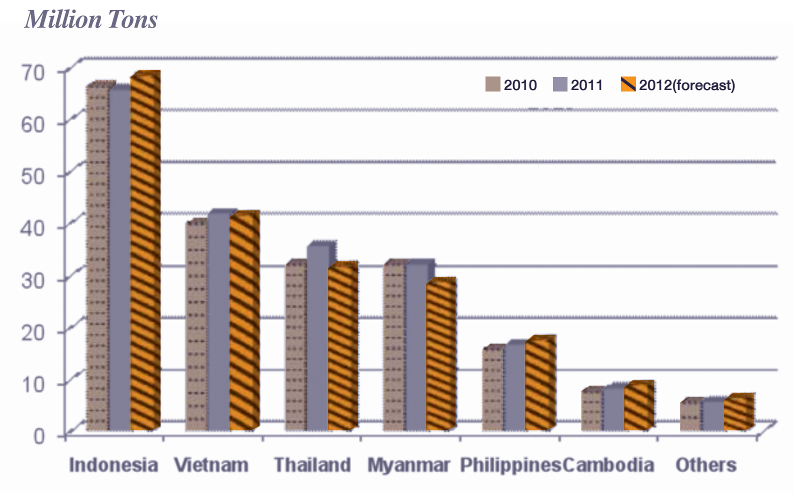


Figure 1 Paddy production of selected countries in ASEAN, 2010–2012

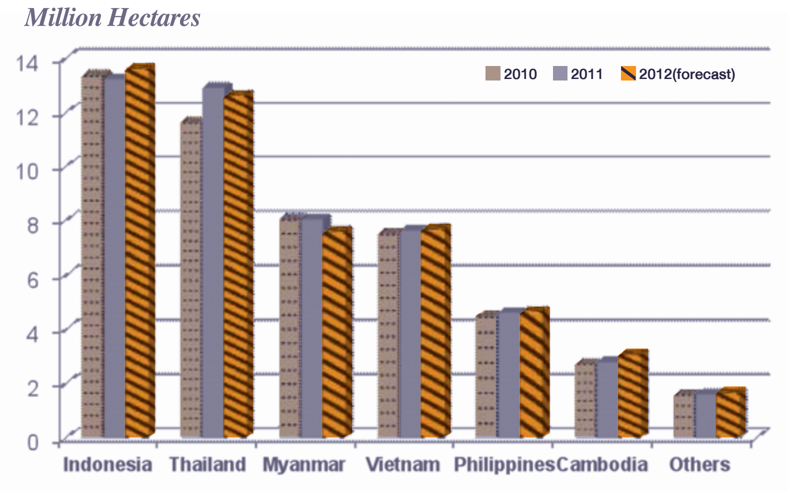


Figure 2 Paddy planted area of selected countries in ASEAN, 2010–2012

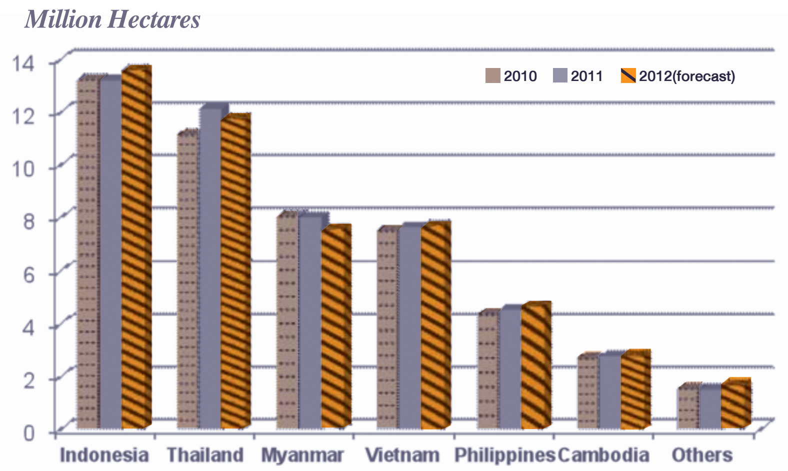


Figure 3 Paddy harvested area of selected countries in ASEAN, 2010–2012

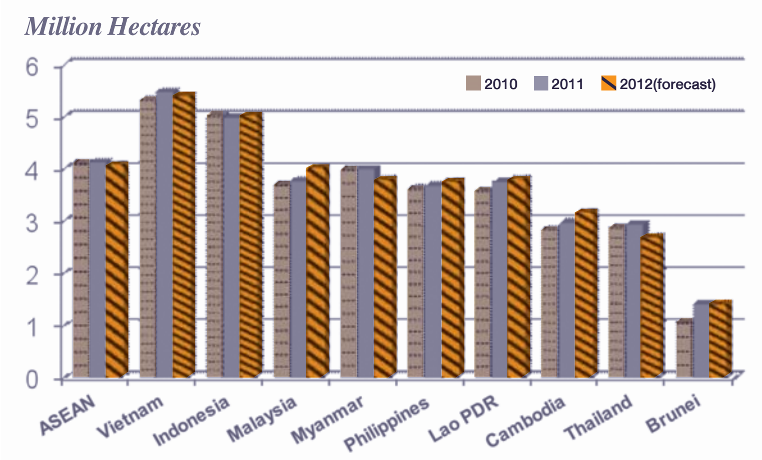


Figure 4 Paddy yield of countries in ASEAN, 2010–2012

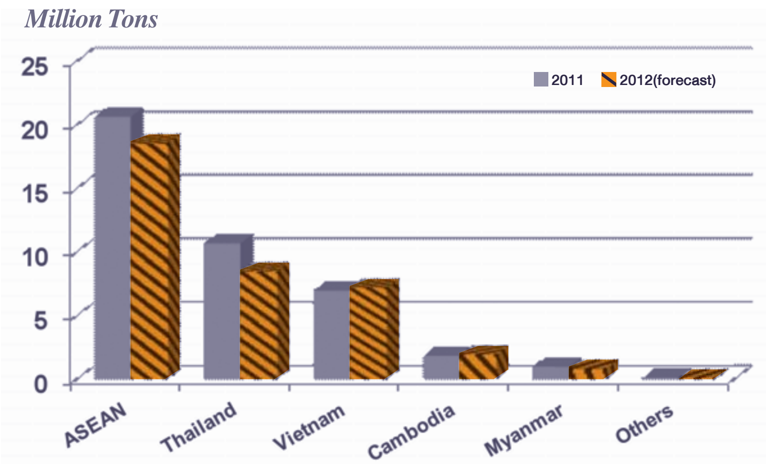


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2011–2012

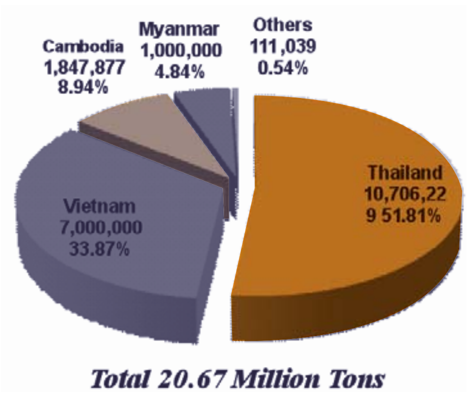


Figure 6 Share of rice export (tons) among ASEAN countries, 2011

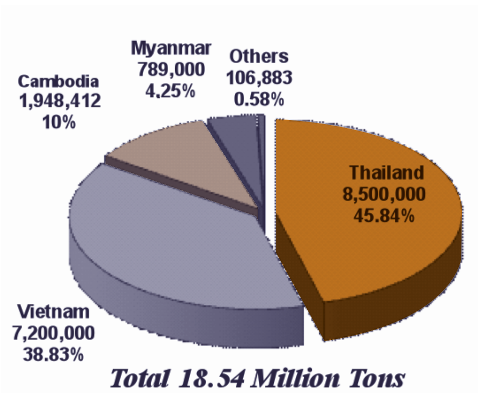


Figure 7 Share of rice export (tons) among ASEAN countries, 2012

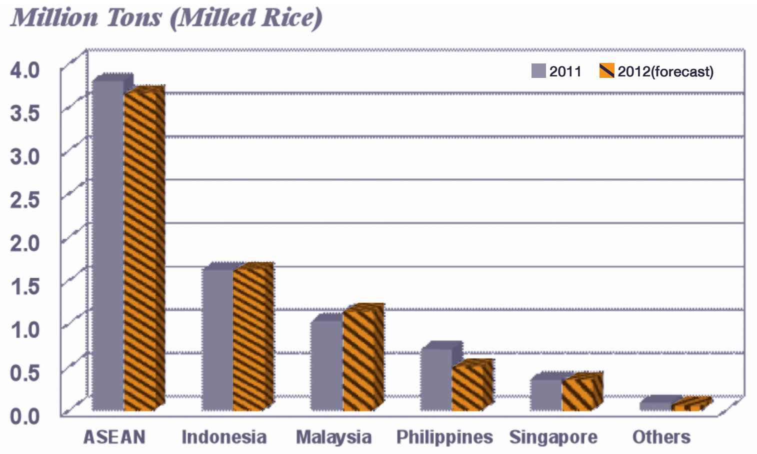


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2011–2012

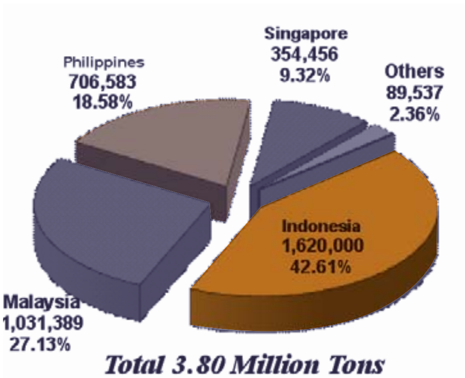


Figure 9 Share of rice import (tons) among ASEAN countries, 2011

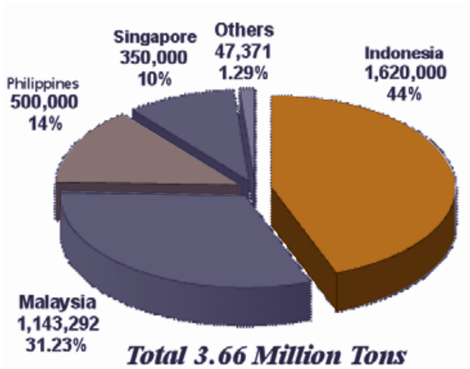


Figure 10 Share of rice import (tons) among ASEAN countries, 2012

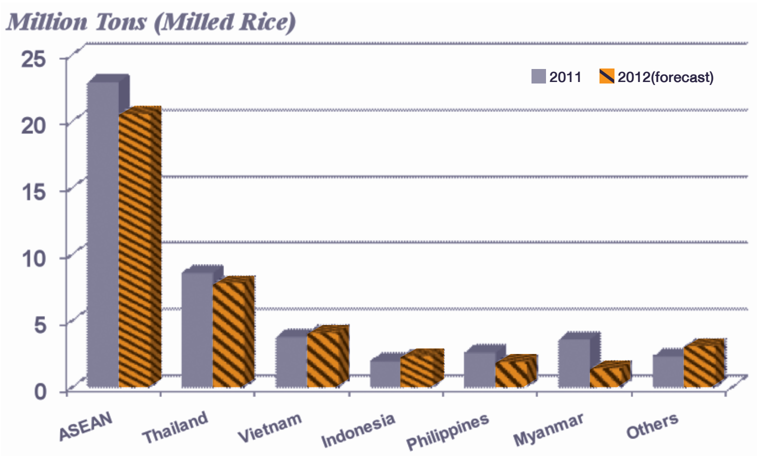


Figure 11 Amount of ending stock of rice in ASEAN countries

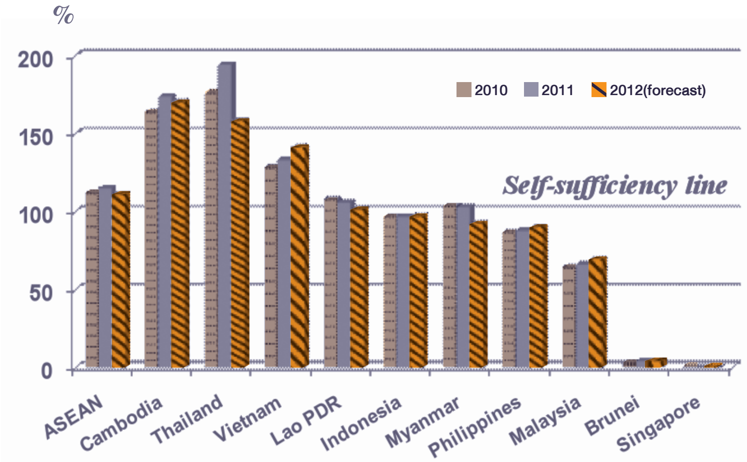


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries, 2010–2012

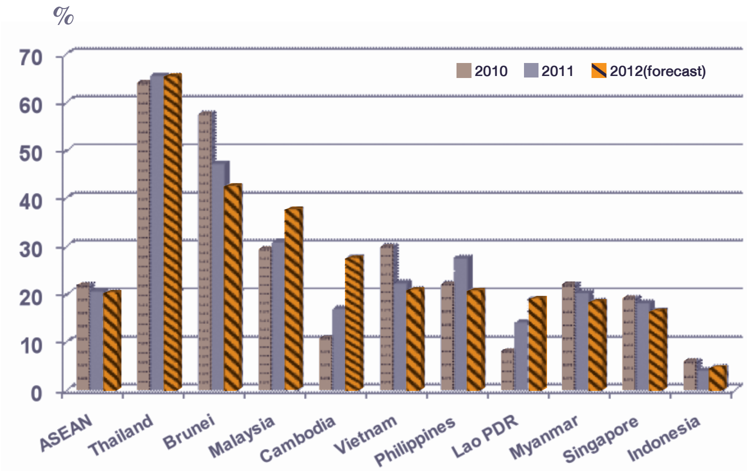


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2010–2012

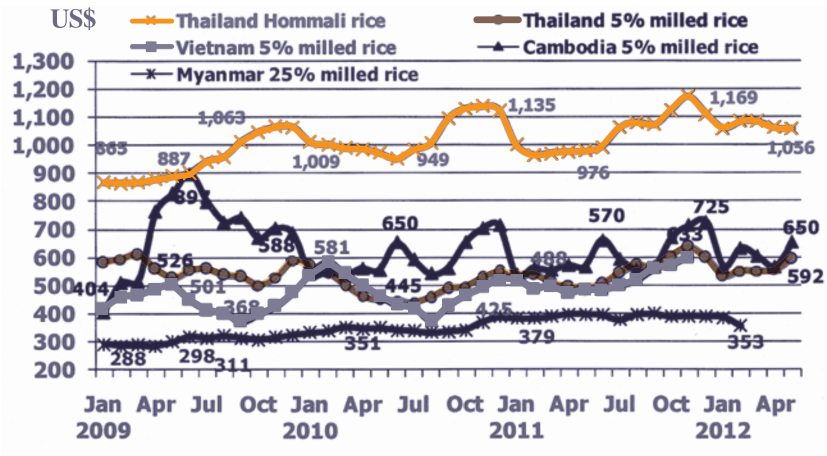


Figure 14 FOB price (US$) of milled rice of selected countries in ASEAN in 2009–2012

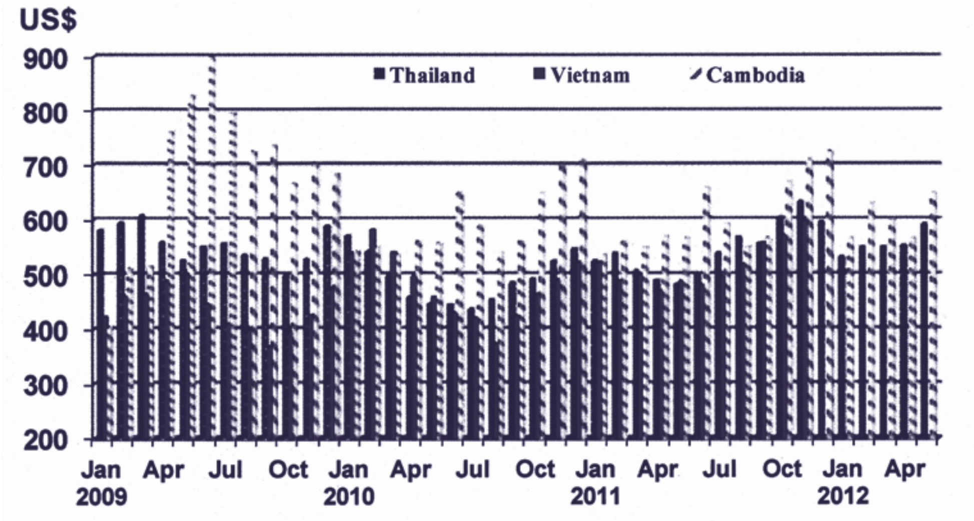


Figure 15 FOB price (US$) of milled rice of selected countries in ASEAN in 2009–2012

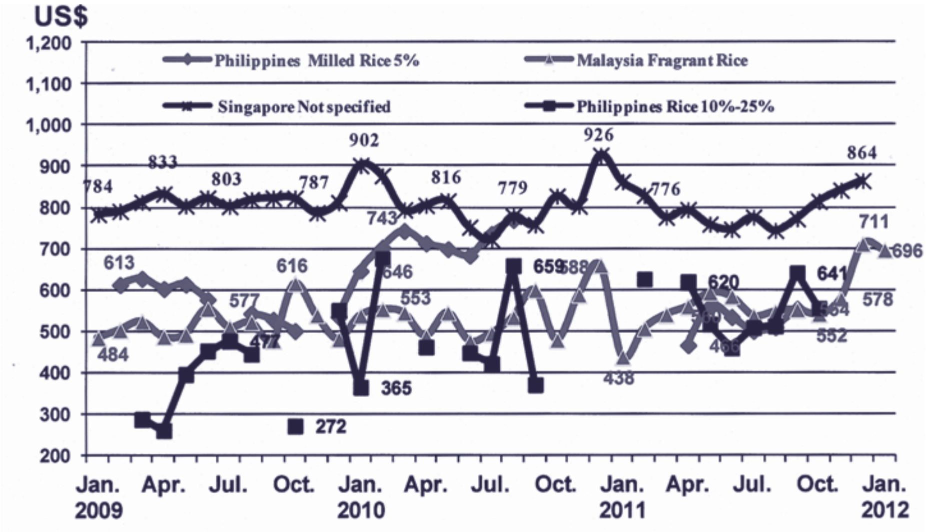


Figure 16 CIF price (US$) of milled rice of selected countries in ASEAN in 2009–2012

Highlights of Maize Outlook for 2012

- Maize supply in ASEAN is forecast to increase from 49.06 million tons in 2011 (crop year 2010/11) to 52.93 million tons in 2012 (crop year 2011/12), an increase of 3.87 million tons or about 8 percent due to the increase in production and the import.
- Maize production in ASEAN is forecast to increase from 37.16 million tons in 2011 to 39.29 million tons in 2012, an increase of 2.13 million tons or about 6 percent.
- Maize export from ASEAN is forecast to be 1.07 million tons which is slightly decreased from the previous year while the import is expected to increase from 6.88 million tons to 7.26 million tons for the same period.
- The beginning stock is estimated to increase from 5.02 million tons in 2011 to 6.38 million tons which is about 27 percent increase while the ending stock is forecast to increase from 6.38 million tons to 7.32 million tons, an increase of about 15 percent during the same period.
- The production to domestic utilization ratio for 2012 is forecast to be slightly decreases from about 90 percent which is about the same situation compared to 2011.
- The beginning stock to domestic utilization ratio is forecast to increase from 12 percent in 2011 to 14 percent in 2012 which is still not secured enough in terms of feed supply for the region.

Table 15 Summary of the ASEAN maize situation, 2011–2012

Items	2011	2012	Change	
			Quantity	%
Supply (Million tons)	49.06	52.93	3.87	7.89
Beginning stock	5.02	6.38	1.36	27.09
Production	37.16	39.29	2.13	5.73
Import	6.88	7.26	0.38	5.52
Demand (Million tons)	49.06	52.93	3.87	7.89
Domestic utilization	41.51	44.53	3.02	7.28
Export	1.17	1.07	-0.10	-8.55
Ending stock	6.38	7.32	0.94	14.73
Ratio of production to domestic utilization (%)	89.51	88.24	-1.27	–
Ratio of beginning stock to domestic utilization (%)	12.10	14.32	2.22	–

ASEAN Maize Situation in 2011

Production

The maize production in ASEAN in 2011 (crop year 2010/11) was estimated to be 37.16 million tons, a slightly increase from 37.04 million tons in 2010. The increase has occurred in most countries, except Indonesia, Thailand and Cambodia (Table 16, Figure 17). Only seven countries in the region grow maize for feed. Brunei, Malaysia and Singapore do not grow maize for feed. The largest maize growing countries in ASEAN is Indonesia and followed by the Philippines. Vietnam and Thailand have approximately about the same size in terms of planted area.

The decrease in production in Indonesia came from the reduction of the planted area due to the increase in price of the competing crops while the yield was slightly increased. For Thailand, the contraction of the production derived from the decline in planted area due to the increase in price of competing crops during the second crop season. However, the change is very small compared with the previous year. The yield was slightly increased. For the Philippines, even though the planted area has decreased the production has increased due to increases in both harvested area and yield. In Cambodia, the decrease in production attributed to the decrease in area while the yield was slightly increased. The reduction of the area was due to the decrease in maize price and the increase in the price of the competing crops. For Lao PDR, even though the planted area has decreased, the production has increased due to the increase in the yield. The increase in production in Myanmar, derived from the increase in both area and yield. The increase in the yield was a result of the farmer responded to the price increase. For Vietnam, the production has increased as a result of the expansion in area and the increase in the yield. The increase in area attributed to the farmers responded to price increase. The rise in yield was due to the farmers used more improved varieties. (Table 16-19, Figure 17-20)

Utilization and Stock

The maize utilization in the ASEAN in 2011 was estimated at 41.51 million tons, an increase of 0.56 million ton compared to previous year (Table 21). Most of the maize production in the ASEAN is used for animal feed not for making ethanol. The increase in domestic utilization has occurred in Myanmar, the Philippines, Singapore, Thailand and Vietnam while other countries the domestic utilization was slightly decreased.

The beginning stock in the ASEAN in 2011 was estimated at 5.02 million tons, a significant increase of 1.49 million ton or 42 percent compared to 3.53 million tons in 2010. The ratio of maize production to domestic utilization for the whole ASEAN in 2011 was estimated to be about 90 percent indicated that the ASEAN by itself

produced maize not enough for the regional consumption (Table 23, Figure 28). On the country by country basis, only Cambodia, Myanmar, and Lao PDR have the ratio well above 100 percent. For other producing countries, Thailand and the Philippines, the ratio of production to domestic utilization were a little above or below 100 percent or marginally self-sufficient. For Indonesia, the biggest maize producing country and Vietnam were still produced maize not enough for domestic consumption. The ratio of beginning stock to the domestic utilization for the ASEAN was estimated to be 12 percent indicated that the region is not secured enough in terms of animal feed requirement (Table 24, Figure 29). The countries that have the ratio above 20 percent which, in general, is considered to be the optimum rate, are Myanmar, Thailand and Cambodia.

Trade

Even though the ASEAN as a whole could not produce maize enough for its own consumption, the ASEAN is still exported some maize. The maize exported from the ASEAN in 2011 was 1.17 million tons which was less than the 6.88 million tons of maize import. The major exporting countries in the region in 2011 were Cambodia, Thailand, Lao PDR and Myanmar respectively (Table 21, Figure 21 and 22). The major importing countries were Malaysia, Indonesia, and Vietnam respectively (Table 21, Figure 24 and 25). Thailand was also imported about 195,552 tons which was less than the 318,961 tons of maize export. The quantity and value of maize export by countries of destination and the quantity and value of import by countries of origin are given in table 25 - 26.

Prices

The monthly FOB prices and CIF prices for exporting and importing countries between 2009 -2012 are shown in Table 27-28. In general, the FOB prices in 2011 in all countries were higher than in 2010. The FOB prices of Thailand were highest among exporting countries. Similarly, for the CIF prices, the prices in 2011 were also higher than in 2010.

Damaged area

The damaged area of maize in 2011 was estimated at 116,093 hectares. The major damages were caused by the flood and the drought respectively. The most affected country by the flood was Thailand. The most damage caused by the drought was also occurred in Thailand (Table 20).

Prospects for Maize in 2012

The maize production in ASEAN in 2012 is forecast to be 39.29 million tons, an increase of 2.13 tons or about 6 percent compared to 37.16 million tons in 2011 (Table 16, Figure 17). Every country, except Myanmar, is forecast to increase its production. Indonesia is expected to increase the most and follows by the Philippines. The increase in production in Indonesia is forecast due to the expansion in area as a result of farmer responded to the price increase and the government policy including the favorable weather while the yield is forecast to be slightly decreased.

For the Philippines, the increase in production is forecast to come from the increase in both area and yield. The expansion of the area is expected due to the increase in the price received by farmers in previous crop together with the favorable weather condition. The increase in yield is projected because the farmers will use improved variety more (Table 16-19, Figure 17-20).

Utilization and Stock

The domestic utilization of maize in the ASEAN in 2012 is forecast to be 44.53 million tons, an increase of about 3.02 million tons or 7 percent compared to the previous year (Table 21 and 22). Regarding the beginning stock, ASEAN as a whole is estimated to carry maize stock about 6.38 million tons, an increase of about 1.36 million tons or 27 percent. The ratio of production to domestic utilization is expected to be 88 percent which is decrease from previous year (Table 23, Figure 28).

The ratio of beginning stock to domestic utilization is forecast to increase from 12 percent in 2011 to about 14 percent in 2012 (Table 24, Figure 29). Even though the situation is improving but ASEAN as a whole is still not secured enough in terms of feed supply.

Trade

Maize export from ASEAN in 2012 is expected to be 1.07 million tons, a slightly decrease from the previous year (Table 22, Figure 21 and 23). For the import by ASEAN, it is forecast to increase from 6.88 million tons in 2011 to 7.26 million tons in 2012 (Table 22, Figure 24 and 26).

Table 16 Maize production in ASEAN countries, 2010–2012

Unit: 1,000 Tons

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	37,039.85	37,155.00	115.15	0.31	39,290.80	2,135.79	5.75
Brunei	–	–	–	–	–	–	–
Cambodia	773.27	717.19	-56.08	-7.25	781.70	64.51	9.00
Indonesia	18,327.64	17,629.03	-698.60	-3.81	19,225.45	1,596.42	9.06
Lao PDR	914.98	917.72	2.74	0.30	956.15	38.44	4.19
Malaysia	–	–	–	–	–	–	–
Myanmar	1,184.95	1,354.64	169.69	14.32	1,222.35	-132.29	-9.77
Philippines	6,376.80	6,971.22	594.42	9.32	7,388.33	417.11	5.98
Singapore	–	–	–	–	–	–	–
Thailand	4,855.42	4,779.61	-75.81	-1.56	4,808.82	29.21	0.61
Vietnam	4,606.80	4,785.60	178.80	3.88	4,908.00	122.40	2.56

Table 17 Maize planted area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	9,828.83	9,455.73	-373.10	-3.80	9,952.83	497.10	5.26
Brunei	–	–	–	–	–	–	–
Cambodia	213.62	174.26	-39.36	-18.43	175.90	1.64	0.94
Indonesia	4,172.26	3,861.63	-310.63	-7.45	4,277.50	415.87	10.77
Lao PDR	184.91	181.70	-3.21	-1.73	202.29	20.59	11.33
Malaysia	–	–	–	–	–	–	–
Myanmar	355.14	389.44	34.30	9.66	411.68	22.25	5.71
Philippines	2,580.09	2,556.08	-24.01	-0.93	2,580.29	24.21	0.95
Singapore	–	–	–	–	–	–	–
Thailand	1,195.92	1,160.52	-35.39	-2.96	1,150.16	-10.36	-0.89
Vietnam	1,126.90	1,132.10	5.20	0.46	1,155.00	22.90	2.02

Table 18 **Maize harvested area in ASEAN countries, 2010–2012**

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	9,648.73	9,339.62	-309.11	-3.20	9,887.95	548.33	5.87
Brunei	–	–	–	–	–	–	–
Cambodia	189.53	159.79	-29.74	-15.69	173.40	13.61	8.52
Indonesia	4,131.68	3,861.43	-270.24	-6.54	4,265.71	404.27	10.47
Lao PDR	184.91	181.69	-3.22	-1.74	202.29	20.60	11.34
Malaysia	–	–	–	–	–	–	–
Myanmar	354.74	389.07	34.33	9.68	411.48	22.41	5.76
Philippines	2,499.04	2,544.61	45.57	1.82	2,580.29	35.67	1.40
Singapore	–	–	–	–	–	–	–
Thailand	1,161.94	1,070.93	-91.02	-7.83	1,099.79	28.87	2.70
Vietnam	1,126.90	1,132.10	5.20	0.46	1,155.00	22.90	2.02

Table 19 **Maize yield in ASEAN countries, 2010–2012**

Unit: Ton/Hectare

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	3.84	3.98	0.14	3.65	3.97	-0.01	-0.25
Brunei	–	–	–	–	–	–	–
Cambodia	4.08	4.49	0.41	10.05	4.51	0.02	0.45
Indonesia	4.44	4.57	0.13	2.93	4.51	-0.06	-1.31
Lao PDR	4.95	5.05	0.10	2.02	4.73	-0.32	-6.34
Malaysia	–	–	–	–	–	–	–
Myanmar	3.34	3.48	0.14	4.19	2.97	-0.51	-14.66
Philippines	2.55	2.74	0.19	7.45	2.86	0.12	4.38
Singapore	–	–	–	–	–	–	–
Thailand	4.18	4.46	0.28	6.70	4.37	-0.09	-2.02
Vietnam	4.09	4.23	0.14	3.42	4.25	0.02	0.47

Table 20 **Maize damaged area in ASEAN by cause of damage, 2011**

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Other	Total
ASEAN	94,348	20,818	789	–	138	116,093
Brunei	–	–	–	–	–	–
Cambodia	14,464	–	–	–	–	14,464
Indonesia	–	–	196	–	–	196
Lao PDR	–	–	–	–	–	–
Malaysia	–	–	–	–	–	–
Myanmar	371	–	–	–	–	371
Philippines	10,735	–	593	–	138	11,466
Singapore	–	–	–	–	–	–
Thailand	68,778	20,818	–	–	–	89,596
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Note: Damaged area for Indonesia is cause of pest and diseases

Table 21 Maize balance sheet of ASEAN countries, 2011

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,021,424	37,155,605	6,880,242	49,057,271	41,508,386	1,172,464	6,376,421	49,057,271
Brunei	n.a.	–	1,176	1,176	1,176	0	n.a.	1,176
Cambodia	43,384	717,788	0	761,172	146,847	571,849	42,476	761,172
Indonesia	1,875,451	17,629,033	2,687,336	22,191,820	19,763,819	7,103	2,420,898	22,191,820
Lao PDR	n.a.	917,715	7,392	925,107	757,118	167,989	n.a.	925,107
Malaysia	317,000	–	2,905,593	3,222,593	2,889,850	6,550	326,193	3,222,593
Myanmar	733,690	1,354,638	–	2,088,328	829,793	100,000	1,158,535	2,088,328
Philippines	152,500	6,971,221	66,193	7,189,914	7,023,802	12	166,100	7,189,914
Singapore	0	–	17,000	17,000	17,000	0	0	17,000
Thailand	1,363,896	4,779,610	195,552	6,339,058	4,355,916	318,961	1,664,181	6,339,058
Vietnam	535,503	4,785,600	1,000,000	6,321,103	5,723,065	0	598,038	6,321,103

Table 22 Maize balance sheet of ASEAN countries, 2012

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	6,376,421	39,290,797	7,259,211	52,926,429	44,529,202	1,073,593	7,323,634	52,926,429
Brunei1/	n.a.	–	1,211	1,211	1,211	0	n.a.	1,211
Cambodia	42,476	781,700	0	824,176	149,520	566,693	107,963	824,176
Indonesia	2,420,898	19,225,449	2,682,000	24,328,347	21,745,957	6,000	2,576,390	24,328,347
Lao PDR	n.a.	956,153	n.a	956,153	956,153	–	n.a.	956,153
Malaysia1/	326,193	–	3,060,000	3,386,193	3,000,000	15,000	371,193	3,386,193
Myanmar1/	1,158,535	1,222,348	–	2,380,883	850,000	185,900	1,344,983	2,380,883
Philippines	166,100	7,388,327	–	7,554,427	7,351,567	–	202,860	7,554,427
Singapore1/	–	–	16,000	16,000	16,000	0	0	16,000
Thailand	1,664,181	4,808,820	300,000	6,773,001	4,524,689	300,000	1,948,312	6,773,001
Vietnam	598,038	4,908,000	1,200,000	6,706,038	5,934,105	0	771,933	6,706,038

Table 23 Ratio of maize production to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	37,039,852	40,950,785	90.45	37,155,605	41,508,386	89.51	39,290,797	44,529,202	88.24
Brunei	-	2,945	-	-	1,176	-	-	1,211	-
Cambodia	773,269	162,386	476.19	717,788	146,847	488.80	781,700	149,520	522.81
Indonesia	18,327,636	19,781,873	92.65	17,629,033	19,763,819	89.20	19,225,449	21,745,957	88.41
Lao PDR	914,980	914,980	100	917,715	757,118	121.21	956,153	956,153	100.00
Malaysia	-	3,001,848	-	-	2,889,850	-	-	3,000,000	-
Myanmar	1,184,950	765,553	154.78	1,354,638	829,793	163.25	1,222,348	850,000	143.81
Philippines	6,376,796	6,567,140	97.1	6,971,221	7,023,802	99.25	7,388,327	7,351,567	100.50
Singapore	-	13,698	-	-	17,000	-	-	16,000	-
Thailand	4,855,421	4,275,730	113.56	4,779,610	4,355,916	109.73	4,808,820	4,524,689	106.28
Vietnam	4,606,800	5,464,632	84.3	4,785,600	5,723,065	83.62	4,908,000	5,934,105	82.71

Table 24 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	3,529,312	40,950,785	8.62	5,021,424	41,508,386	12.10	6,376,421	44,529,202	14.32
Brunei	n.a.	2,945	-	n.a.	1,176	-	n.a.	1,211	-
Cambodia	27,919	162,386	17.19	43,384	146,847	29.54	42,476	149,520	28.41
Indonesia	1,590,688	19,781,873	8.04	1,875,451	19,763,819	9.49	2,420,898	21,745,957	11.13
Lao PDR	n.a.	914,980	-	n.a.	757,118	-	n.a.	956,153	-
Malaysia	308,000	3,001,848	10.26	317,000	2,889,850	10.97	326,193	3,000,000	10.87
Myanmar	324,693	765,553	42.41	733,690	829,793	88.42	1,158,535	850,000	136.30
Philippines	254,400	6,567,140	3.87	152,500	7,023,802	2.17	166,100	7,351,567	2.26
Singapore	-	13,698	-	0	17,000	-	-	16,000	-
Thailand	810,277	4,275,730	18.95	1,363,896	4,355,916	31.31	1,664,181	4,524,689	36.78
Vietnam	213,335	5,464,632	3.9	535,503	5,723,065	9.36	598,038	5,934,105	10.08

Table 25 Quantity and Value of Maize Export by Countries of Destination in 2011

Quantity: Tons Values: US$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									225	148			4,344	1,326
Lao PDR														
Malaysia	215	89,334	5,969	2,648,470	306	95,699								
Myanmar														
Philippines					0.2	895								
Singapore									82	33,588	96	22,137		
Thailand					56,250	16,915,069	91	24,759	119,718	36,791,869			42,740	12,752,764
Vietnam				195,614				817,777		8,954				

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	237	169	298	598	415	1,163	5,519	3,404	1,570	1,322	7,088	4,727
Lao PDR			108,276	7,940,523	59,713	10,828,295	167,989	18,768,818			167,989	18,768,818
Malaysia	30	27,941					6,520	2,861,444	30	11,336	6,550	2,872,780
Myanmar												
Philippines			3	1,400	5	28,470	8.2	30,765	4	12,638	12	43,403
Singapore							178	55,725	13,591	3,828,245	13,769	3,883,970
Thailand	0.12	168			90,990	28,087,346	309,789	94,571,975	9,172	3,015,060	318,961	97,587,035
Vietnam				1,092,227				2,114,572		1,789,633		3,904,205

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 26 Quantity and Value of Maize Import by Countries of Origin in 2011

Quantity: Tons Values: US$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									3,487	3,535	56,530	18,074	4	13
Lao PDR														
Malaysia					176	90,662					10,952	3,276,974	32	23,516
Myanmar														
Philippines					2,225	1,256,724					18,737	5,970,385		
Singapore									36	35,880				
Thailand			28,323	3,853,920			167,149	20,387,075						
Vietnam [1/]			40,506	13,830,140			21,030	5,433,510						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	742	217	27,899	13,747			88,661	35,58	2,598,675	845,693	2,687,336	881,278
Lao PDR			3,860	3,661,765	308	614,857	4,168	4,276,622	3,224	608,659	7,392	4,885,281
Malaysia			21,011	8,490,600	32	13,430	32,202	11,895,182	2,873,390	943,676,269	2,905,593	955,571,451
Myanmar												
Philippines			18,749	7,008,824			39,711	14,235,933	26,482	33,791,461	66,193	48,027,394
Singapore							36	35,880	35	81,680	71	117,560
Thailand							195,472	24,240,995	80	9,171	195,552	24,250,166
Vietnam			142,799	72,206,655			204,335	91,470,305	767,919	235,464,019	972,254	326,934,324

Remark: The data in this table is obtained from national focal points of member states and may not complete.

[1] *data from USDA in April 2012*

Table 27 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	2010	215	235	225	225	250	245	240	255	260	245	230	225	238
	2011	210	240	235	250	260	250	235	260	255	250	240	230	243
	2012	218	245	227	255	265								242
Myanmar	2010	213	193	181	187	208	196		352	267	256	246	241	231
	2011	251	249	255	262	268	286	291	289	289	287	284	276	274
	2012	283	273											278
Thailand	2009	217	213	221	221	215	226	191	190	189	196	222	242	212
	2010	252	261	283	282	295	307	298	296	313	317	318	314	295
	2011	320	322	340	365	358	327	320	314	309	311	327	328	328
Lao PDR	2009	147	147	149	149	149	158	153	286	286	286	162	162	186
	2010	152	152	155	155	155	164	158	297	297	297	168	168	193

Table 28 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	257	259	263	272	251
	2011	279	303	313	333	345	347	351	341	331	327	308	326	325
	2012	318												
Philippines In-quota	2010						502	362					469	444
	2011	457	593	312	355	594		429	n.a.	n.a.	493	n.a.	337	446
Out-quota	2010	244	225	320	384		288	274	234	342	268	427	627	330
	2011	406	312	317	313	315	557	498	985	501		235	410	441
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
Indonesia	2010	216	298	239	241	378	236	311	924	229	241	365	283	330
	2011	234	487	1,400	304	2,261	908	646	648	317	707	433	684	752

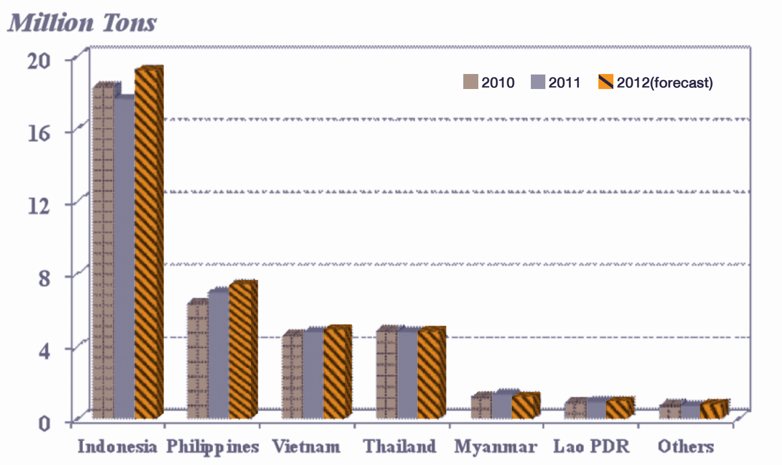


Figure 17 **Maize production of selected countries in ASEAN, 2010–2012**

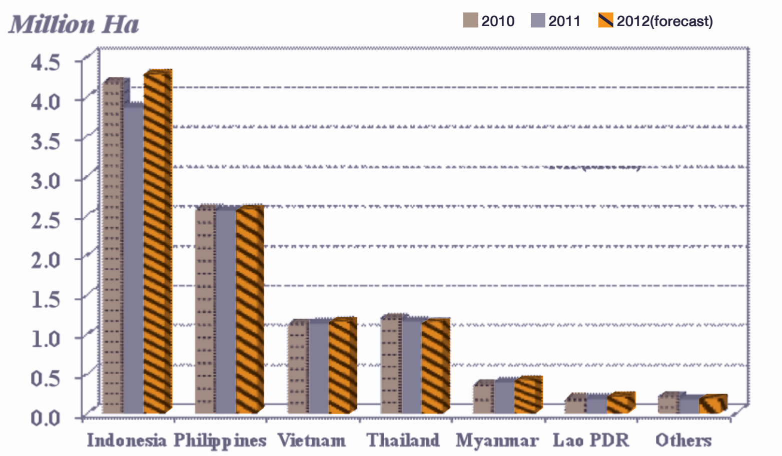


Figure 18 **Maize planted area of selected countries in ASEAN, 2010–2012**

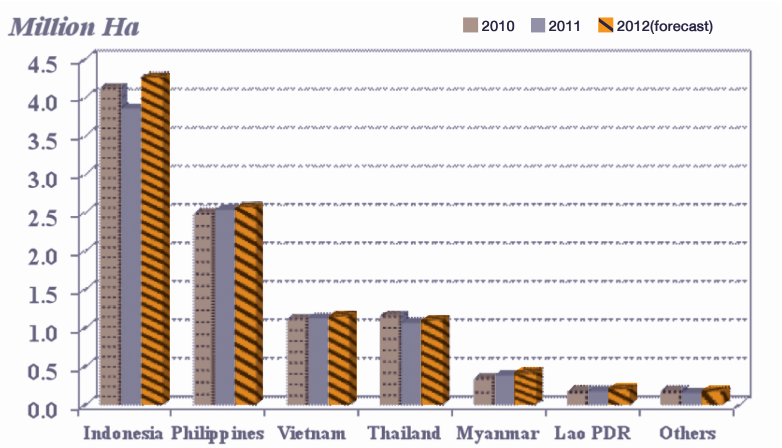


Figure 19 **Maize harvested area of selected countries in ASEAN, 2010–2012**

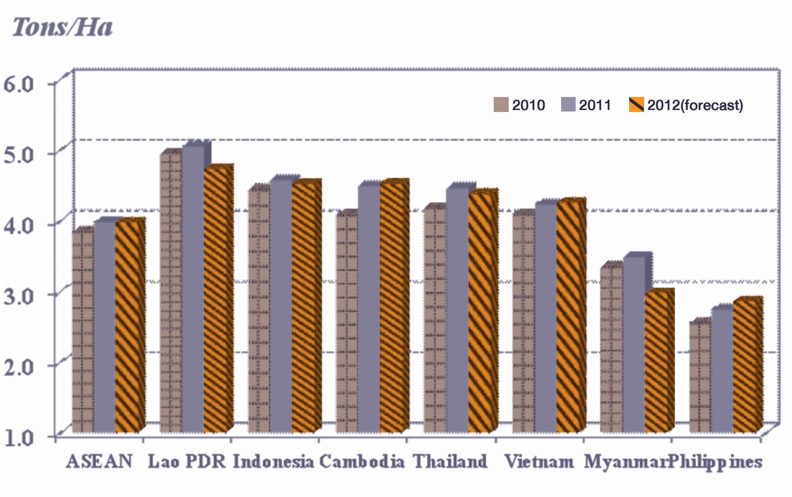


Figure 20 Maize yield of countries in ASEAN, 2010–2012

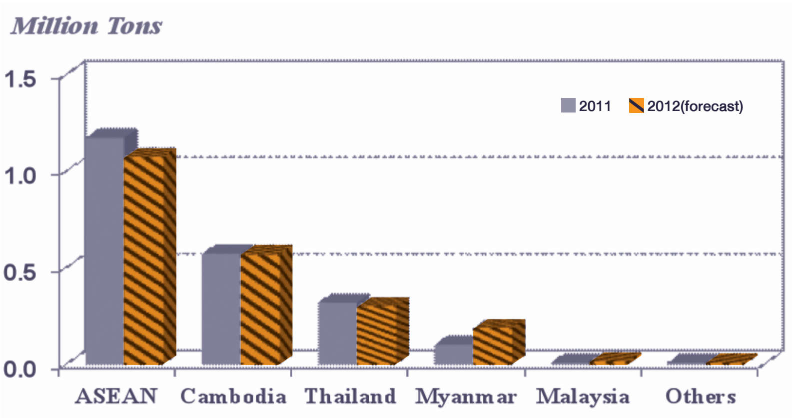


Figure 21 Amount of maize export (million tons) of selected countries in ASEAN in 2011–2012

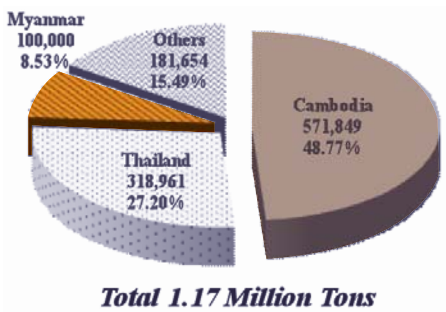


Figure 22 Share of maize export (ton) among ASEAN countries, 2011

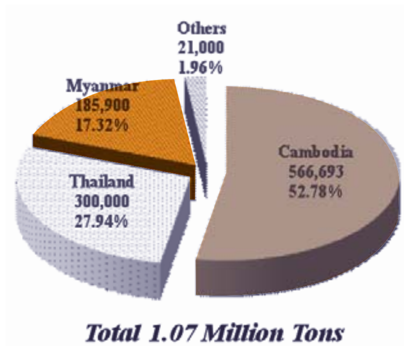


Figure 23 Share of maize export (ton) among ASEAN countries, 2012

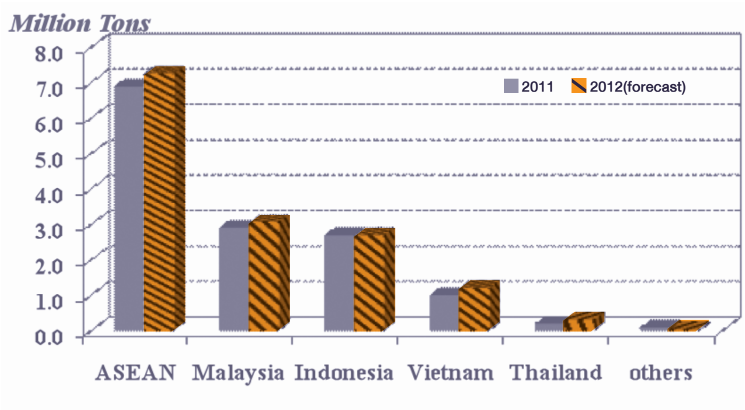


Figure 24 Amount of maize import (million tons) by selected countries in ASEAN in 2011–2012

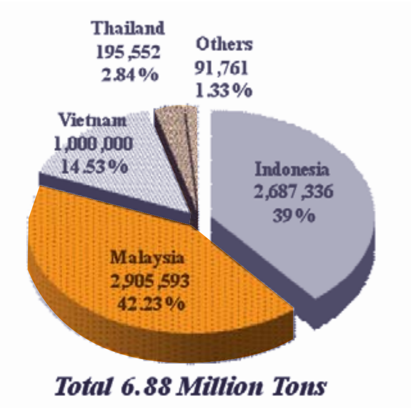


Figure 25 Share of maize import (tons) among ASEAN countries, 2011

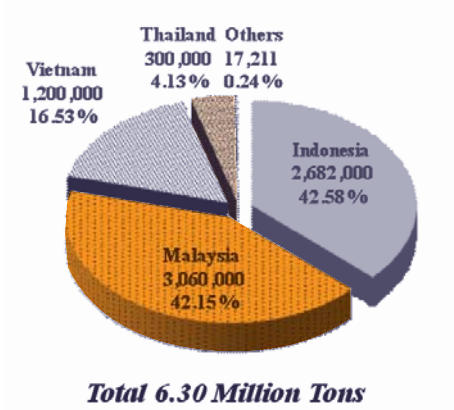


Figure 26 Share of maize import (tons) among ASEAN countries, 2012

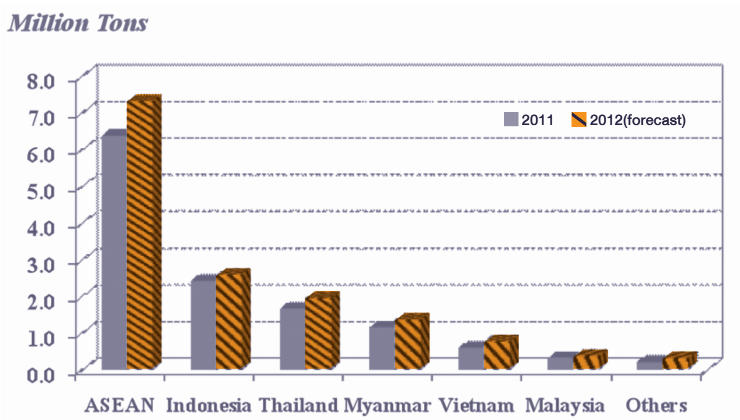


Figure 27 Amount of ending stock of maize in ASEAN countries

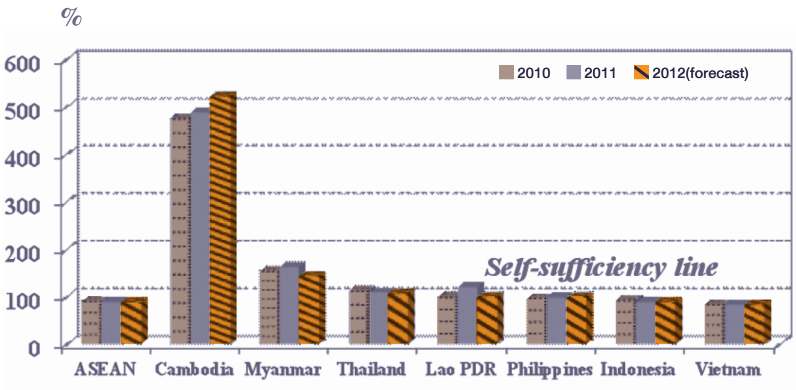


Figure 28 Ratio of maize production to domestic utilization in ASEAN countries, 2010–2012

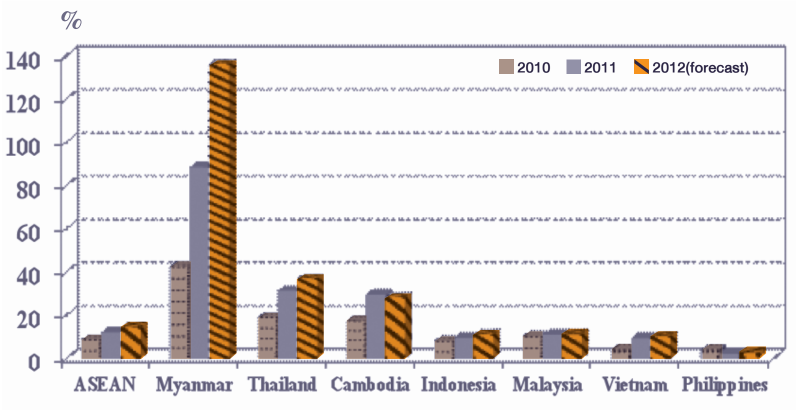


Figure 29 Ratio of maize beginning stock to domestic utilization in ASEAN countries , 2010–2012

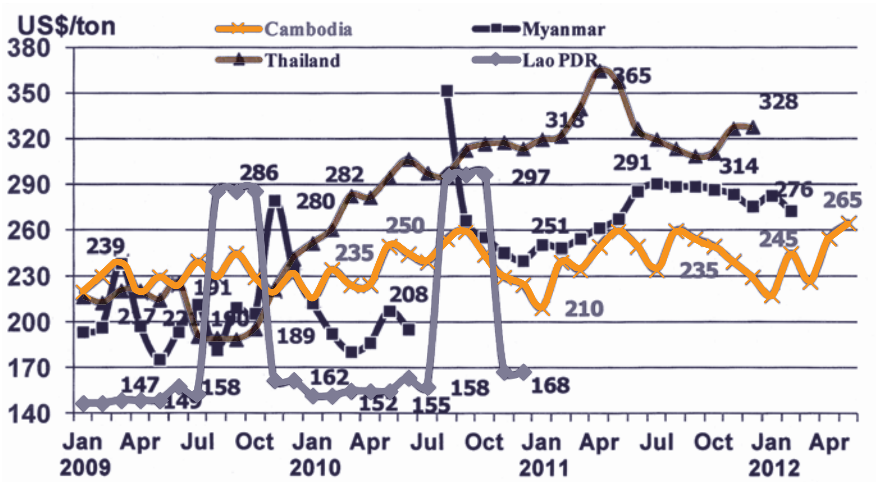


Figure 30 FOB price (US$) of maize of selected countries in ASEAN in 2009–2012

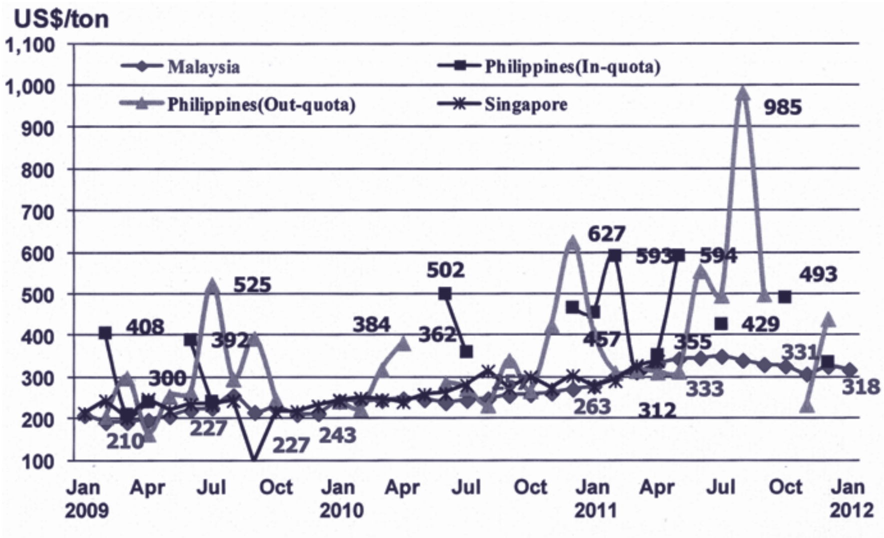


Figure 31 CIF price (US$) of maize of selected countries in ASEAN in 2009–2012

Highlights of Sugar Outlook for 2012

- ASEAN sugar supply is forecast to increase about 11 percent from 25.14 million tons in 2011 to 27.95 million tons in 2012 mainly due to the increase in stock carried over from the previous year and the increase in production. The increase in production is forecast due to the response to the price increase in previous year.
- The beginning stock of sugar in 2012 is estimated at 5.73 million tons, up from 3.37 million tons in 2011 which is about 70 percent increase.
- The sugar export from ASEAN in 2012 is expected to increase from 6.60 million tons in 2011 to 8.96 million tons in 2012 due to the expected increase in domestic production and oversea demand.
- The sugar import is also expected to decrease about 3 percent from 4.21 million tons in 2011 to 4.10 million tons in 2012.
- The production to domestic utilization ratio for sugar in 2012 is forecast to be 134 percent compared to 138 in 2011.
- The beginning stock to domestic utilization ratio in 2012 is forecast to be 42.45 percent, which is higher than 16 percent in 2011.

Table 29 Summary of the ASEAN sugar situation, 2011–2012

Items	2011	2012	Change	
			Quantity	%
Supply (Million tons)	25.14	27.95	2.81	11.18
Beginning stock	3.37	5.73	2.36	70.03
Production	17.57	18.12	0.55	3.13
Import	4.21	4.10	-0.11	-2.61
Demand (Million tons)	25.14	27.95	2.81	11.18
Domestic utilization	12.77	13.50	0.73	5.72
Export	6.60	8.96	2.36	35.76
Ending stock	5.73	5.44	-0.29	-5.06
Ratio of production to domestic utilization (%)	137.61	134.16	-3.45	-
Ratio of beginning stock to domestic utilization (%)	26.39	42.45	16.06	-

ASEAN Sugar Situation in 2011

Production

The year 2011 was the good year for sugarcane production in ASEAN. The cane production has increased considerably from 127.62 million tons in 2010 to 165.71million tons in 2011, an increase of 38.09 million tons or about 30 percent. The increase was very eminent, in terms of quantity, in Thailand. In terms of percentage increase, the most increase has occurred in the Philippines and Lao PDR (Table 30-33, Figure 32-35).

In Thailand, the biggest sugarcane producing country in the ASEAN, the cane production has jumped up from 68.81 million tons in 2010 to 95.95 million tons in 2011, an increase of 27.14 million tons or 39 percent. The increase in cane production derived from the increase in both area and yield. The expansion of the planted area was mainly due to the response to the price increase while the increase in the yield attributed to the abundance of water supply.

For the Philippines, the second largest sugarcane producing country in the region, the sugarcane production has also enormously increased from 17.93 million tons in 2010 to 28.39 million tons in 2011, an increase of 10.46 million tons or about 58 percent. The increase in production was due to the area expansion and the increase in the yield. The increase in area was due to the farmers' response to the price increase and the recovery from the dry spell in previous year. The increase in yield was due to the favorable weather and the farmers taking care their crops better which motivated by the high price of sugar.

For Vietnam, the third largest sugarcane producing country, the sugarcane production has increased about 5 percent from 15.25 million tons in 2010 to 15.95 million tons in 2011. The increase in production was due to the increase in both planted area and yield. The expansion in area was due to the favorable weather together with the increase in price received by farmers. Motivated by the increase in price led the farmers taking care of their crops better which in turn increase the yield.

For Indonesia, the sugarcane production estimate has decreased a little from 14.89 million tons to 14.48 million tons which is about 3 percent decrease. The reduction in production was solely due to the decrease in the yield as a result of the unfavorable weather that has very long dry spell during growing season.

The increase in yield of sugarcane in Myanmar could not compensate the reduction in the planted area as a result of the decrease in price received by farmers. Thus, the sugarcane production has reduced.

The sugarcane production in Lao PDR in 2011 was almost 50 percent increased from the previous year. This is because the newly established sugar factories in the country is still operated under capacity and need more cane. The area has been expanded in response to the increase in the demand from factories.

Utilization and Stock

Regarding domestic utilization of sugar in the ASEAN, it has increased from 11.69 million tons in 2010 to 12.77 million tons in 2011(Table 35). The beginning stock of sugar in ASEAN in 2011 was estimated at 3.37 million tons, an increase of about 1 million tons compared to the previous year. The ratio of sugar production to domestic utilization in 2011 was estimated to be 138 percent indicated that the production of sugar in ASEAN was enough for the consumption within the region (Table 37, Figure 43).

The ratio of beginning stock to domestic utilization was estimated at 26 percent in 2011, compared to 12 percent in 2010 indicated that the sugar availability in the region has improved (Table 38, Figure 44).

Trade

The sugar export from ASEAN in 2011 was 6.60 million tons compared to 5.21 million tons in 2010, almost 27 percent increase (Table 35, Figure 36 and 37). Thailand is the major sugar exporting country in the region constituted nearly 90 percent of the total ASEAN export. There is no other net exporting country in the region. Most of the exports in other countries were re-exported.

For the import, ASEAN as a whole imported sugar about 4.21 million tons. The major importing countries are Indonesia and Malaysia. Indonesia imported sugar for domestic consumption while Malaysia imported (raw) sugar for domestic consumption as well as for re – export (white sugar) (Table 35, Figure 39 and 40).

The quantity and value of sugar export by countries of destination and the quantity and value of import by countries of origin are given in table 39 and 40.

Prices

The FOB and CIF prices of sugar in exporting and importing countries in ASEAN during 2009 – 2012 are shown in Table 41 – 42. For FOB prices of both raw sugar and white sugar of Thailand, the prices in 2011 were higher than in 2010. Similarly for CIF prices for Indonesia, Malaysia and Singapore, the CIF prices in 2011 were higher than in 2010.

Damaged Area

The sugar damaged area in ASEAN in 2011 was reported to be 22,046 hectares. Most of the damages were caused by the drought which happened in Thailand only and the affected area was 20,009 hectares (Table 34).

Prospects for Sugar in 2012

Production

Sugarcane production in ASEAN is forecast to increase further from 165.71 million tons in 2011 to 175.34 million tons in 2012. In terms of quantity increase, Thailand is expected to increase the most from 95.95 million tons in 2011 to 101.17 million tons in 2012. Indonesia, the Philippines and Vietnam are also expected to increase in sugarcane production. In all countries, the increase in production is due to the response to the increase in price of sugar (Table 30-33, Figure 32-35).

Utilization and Stock

The domestic utilization of sugar in ASEAN is forecast to increase from 12.77 million tons of sugar in 2011 to 13.50 million tons in 2012 which is about 6 percent increase (Table 36).

The beginning stock in ASEAN is estimated at 5.73 million tons of sugar, an increase of 2.36 million tons or about 70 percent compared to 3.37 million tons in the previous year. The ratio of production to domestic utilization in 2012 is forecast to be 134 percent compared to 138 in 2011 (Table 37, Figure 43). The ratio of the beginning stock to domestic utilization in 2012 is forecast to be 42 percent compared to 26 percent in 2011(Table 38, Figure 44). This indicates that the domestic availability of sugar in the region is expected to be in a better situation.

Trade

The export is predicted to increase by 36 percent from 6.60 million tons in 2011 to 8.96 million tons in 2012 due to the increase in cane production and demand for sugar (Table 36, Figure 36 and 38). For the import, it is also forecast to decrease slightly from 4.20 million tons in 2011 to 4.10 million tons in 2012. (Table 36, Figure 39 and 41).

Table 30 Sugarcane production in ASEAN countries, 2010–2012

Unit: 1,000 Tons

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	127,616.12	165,711.07	38,094.96	29.85	175,344.72	9,633.64	5.81
Brunei	-	-	-	-	-	-	-
Cambodia	365.56	468.74	103.18	28.23	547.00	78.26	16.70
Indonesia	14,885.77	14,482.93	-402.84	-2.71	16,908.20	2,425.27	16.75
Lao PDR	818.68	1,222.00	403.33	49.27	1,550.00	328.00	26.84
Malaysia	-	-	-	-	-	-	-
Myanmar	9,561.98	9,249.46	-312.53	-3.27	9,537.43	287.98	3.11
Philippines	17,929.27	28,390.74	10,461.47	58.35	29,137.08	746.35	2.63
Singapore	-	-	-	-	-	-	-
Thailand	68,807.80	95,950.42	27,142.62	39.45	101,165.00	5,214.58	5.43
Vietnam	15,247.06	15,946.80	699.74	4.59	16,500.00	553.20	3.47

Table 31 Sugarcane planted area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	2,287.40	2,641.58	354.18	15.48	2,718.12	76.55	2.90
Brunei	-	-	-	-	-	-	-
Cambodia	17.21	22.61	5.41	31.42	24.80	2.19	9.67
Indonesia	454.11	457.62	3.50	0.77	475.87	18.25	3.99
Lao PDR	15.36	24.77	9.41	61.28	31.00	6.24	25.18
Malaysia	-	-	-	-	-	-	-
Myanmar	160.12	151.51	-8.61	-5.38	154.28	2.77	1.83
Philippines	354.88	439.53	84.65	23.85	435.29	-4.24	-0.96
Singapore	-	-	-	-	-	-	-
Thailand	1,025.63	1,279.25	253.62	24.73	1,326.89	47.64	3.72
Vietnam	260.10	266.30	6.20	2.38	270.00	3.70	1.39

Table 32 Sugarcane harvested area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	2,247.39	2,609.05	361.67	16.09	2,670.40	61.35	2.35
Brunei	–	–	–	–	–	–	–
Cambodia	17.07	22.07	5.00	29.28	24.80	2.73	12.37
Indonesia	432.72	447.13	14.42	3.33	465.58	18.45	4.13
Lao PDR	15.36	24.77	9.41	61.28	31.00	6.24	25.18
Malaysia	–	–	–	–	–	–	–
Myanmar	157.69	150.02	-7.67	-4.86	153.28	3.26	2.17
Philippines	354.88	439.53	84.65	23.85	435.29	-4.24	-0.96
Singapore	–	–	–	–	–	–	–
Thailand	1,009.58	1,259.24	249.66	24.73	1,290.46	31.22	2.48
Vietnam	260.10	266.30	6.20	2.38	270.00	3.70	1.39

Table 33 Sugarcane yield in ASEAN countries, 2010–2012

Unit: Ton/Hectare

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	56.78	63.51	6.73	11.85	64.63	1.12	1.76
Brunei	–	–	–	–	–	–	–
Cambodia	21.41	21.24	-0.17	-0.79	22.06	0.82	3.86
Indonesia	34.40	32.39	-2.01	-5.84	36.32	3.93	12.13
Lao PDR	53.32	49.34	-3.98	-7.46	50.00	0.66	1.34
Malaysia	–	–	–	–	–	–	–
Myanmar	60.64	61.66	1.02	1.68	62.22	0.56	0.91
Philippines	50.52	64.59	14.07	27.85	66.94	2.35	3.64
Singapore	–	–	–	–	–	–	–
Thailand	68.15	76.20	8.05	11.81	78.39	2.19	2.87
Vietnam	58.62	59.88	1.26	2.15	61.11	1.23	2.05

Table 34 Sugarcane damaged area in ASEAN by cause of damage, 2011

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Unspecified	Total
ASEAN	545	20,009	–	–	1,492	22,046
Brunei	–	–	–	–	–	–
Cambodia	545	–	–	–	–	545
Indonesia	–	–	–	–	–	–
Lao PDR.	–	–	–	–	–	–
Malaysia	–	–	–	–	–	–
Myanmar	–	–	–	–	1,492	1,492
Philippines	–	–	–	–	–	–
Singapore	–	–	–	–	–	–
Thailand	–	20,009	–	–	–	20,009
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Table 35 Sugar balance sheet of ASEAN countries, 2011

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	3,368,880	17,567,818	4,205,278	25,141,975	12,766,788	6,595,588	5,732,725	25,141,975
Brunei	6,100	-	5,801	11,901	5,171	-	6,729	11,901
Cambodia	n.a.	46,874	n.a.	46,874	n.a.	n.a.	n.a.	46,874
Indonesia	801,968	2,228,140	1,689,000	4,719,108	4,180,000	1,000	538,108	4,719,108
Lao PDR	n.a.	122,200	15,985	138,185	93,834	44,351	0	138,185
Malaysia	204,749	209,052	1,797,421	2,211,222	1,722,376	279,000	209,846	2,211,222
Myanmar	0	924,946	-	924,946	922,859	0	2,087	924,946
Philippines	371,286	2,597,499	119	2,968,904	1,847,548	578,737	542,619	2,968,904
Singapore	0	-	420,000	420,000	245,000	175,000	0	420,000
Thailand	1,609,746	10,052,429	176,952	11,839,127	2,350,000	5,497,500	3,991,627	11,839,127
Vietnam	375,031	1,386,678	100,000	1,861,709	1,400,000	20,000	441,709	1,861,709

Table 36 Sugar balance sheet of ASEAN countries, 2012

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,732,725	18,116,701	4,104,975	27,954,401	13,503,447	8,961,000	5,435,254	27,954,401
Brunei[1/]	6,729	-	5,975	12,704	6,225	-	6,479	12,704
Cambodia	0	54,700	n.a.	54,700	n.a.	n.a.	n.a.	54,700
Indonesia	538,108	2,601,258	1,689,000	4,828,366	4,435,168	1,000	392,198	4,828,366
Lao PDR	0	155,000	n.a.	155,000	155,000	n.a.	n.a.	155,000
Malaysia[1/]	209,846	-	1,900,000	2,109,846	1,700,000	200,000	209,846	2,109,846
Myanmar	2,087	953,743	-	955,830	947,054	0	8,776	955,830
Philippines[1/]	542,619	2,666,000	nil	3,208,619	2,000,000	600,000	608,619	3,208,619
Singapore[1/]	0	-	480,000	480,000	260,000	220,000	0	480,000
Thailand	3,991,627	10,251,217	nil	14,242,844	2,400,000	7,900,000	3,942,844	14,242,844
Vietnam	441,709	1,434,783	30,000	1,906,492	1,600,000	40,000	266,492	1,906,492

Note: [1/] The value is estimated by AFSIS Project, n.a. = not available,
nil = very small amount and the value of 2012 is forecasting value

Table 37 Ratio of sugar production to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	13,615,856	11,688,361	116.49	17,567,818	12,766,788	137.61	18,116,701	13,503,447	134.16
Brunei	–	5,449	–	–	5,171	–	–	6,225	–
Cambodia	36,556	n.a.	n.a.	46,874	n.a.	–	54,700	n.a.	–
Indonesia	2,290,116	3,595,000	63.70	2,228,140	4,180,000	53.30	2,601,258	4,435,168	58.65
Lao PDR	81,868	81,017	101.05	122,200	93,834	130.23	155,000	155,000	100.00
Malaysia	–	1,446,053	–	209,052	1,722,376	–	–	1,700,000	–
Myanmar	956,198	950,365	100.61	924,946	922,859	100.23	953,743	947,054	100.71
Philippines	1,716,507	1,929,402	88.97	2,597,499	1,847,548	140.59	2,666,000	2,000,000	133.30
Singapore	–	207,483	–	–	245,000	0.00	–	260,000	0.00
Thailand	7,208,781	2,157,593	334.11	10,052,429	2,350,000	427.76	10,251,217	2,400,000	427.13
Vietnam	1,325,831	1,316,000	100.75	1,386,678	1,400,000	99.05	1,434,783	1,600,000	89.67

Table 38 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	2,369,546	11,688,361	20.27	3,368,880	12,766,788	26.39	5,732,725	13,503,447	42.45
Brunei	5,647	5,449	103.64	6,100	5,171	117.95	6,729	6,225	108.10
Cambodia	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0	n.a.	n.a.
Indonesia	352,852	3,595,000	9.82	801,968	4,180,000	19.19	538,108	4,435,168	12.13
Lao PDR	n.a.	81,017	n.a.	n.a.	93,834	–	0	155,000	–
Malaysia	202,279	1,446,053	13.99	204,749	1,722,376	11.89	209,846	1,700,000	12.34
Myanmar	0	950,365	0.00	0	922,859	0.00	2,087	947,054	0.00
Philippines	413,176	1,929,402	21.41	371,286	1,847,548	20.10	542,619	2,000,000	27.13
Singapore	0	207,483	0.00	0	245,000	0.00	0	260,000	0.00
Thailand	1,206,392	2,157,593	55.91	1,609,746	2,350,000	68.50	3,991,627	2,400,000	166.32
Vietnam	189,200	1,316,000	14.38	375,031	1,400,000	26.79	441,709	1,600,000	27.61

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

Table 39 Quantity and Value of Sugar Export by Countries of Destination in 2011

Quantity: Tons Values: US$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									512	469,519			0.42	5,015
Lao PDR														
Malaysia			3,168	2,547,160	24,699	18,857,489							11,105	7,967,786
Myanmar														
Philippines					58,332	32,112,013								
Singapore	329	393,000			13,442	12,474,000			365	328,000			13,167	11,624,000
Thailand	6,153	5,097,748	404,839	278,092,557	1,301,277	707,536,885	52,867	40,145,803	338,980	189,480,009	35,614	34,231,228	168,701	122,960,449
Vietnam				31,072		83,191								

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	706	816,436	3	14,940	169,586	10,491,681	170,807	11,797,591	238,752	35,482,021	409,559	47,279,612
Lao PDR					443,505	32,386,113	443,505	32,386,113			443,505	32,386,113
Malaysia	39,874	29,826,003			20,440	14,406,416	99,286	73,604,853	88,828	64,611,723	188,114	138,216,576
Myanmar												
Philippines					16,000	8,853,950	74,332	40,965,963	504,406	310,485,271	578,738	351,451,234
Singapore			4	3,000	195	148,000	27,502	24,970,000	19,507	34,018,000	47,009	58,988,000
Thailand	179,916	117,352,028			308,582	189,167,288	2,796,929	1,684,063,995	2,700,552	1,314,467,233	5,497,481	2,998,531,228
Vietnam								114,263		171,680,101		171,794,364

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 40 Quantity and Value of Sugar Import by Countries of Origin in 2011

Quantity: Tons Values: US$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									9,285	7,977,129			12	31,951
Lao PDR														
Malaysia													14	23,793
Myanmar														
Philippines														
Singapore									47,074	34,976,000				
Thailand			2,014	206,627	4,385	12,444,902	18,484	2,933,646	871	2,918,898	7	2,782	2,946	10,224,830
Vietnam														

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei			5,801	n.a.			5,801				5,801	
Cambodia												
Indonesia	98	231,969	940,111	671,572,748			949,506	679,813,797	880,613	604,398,076	1,830,119	1,284,211,873
Lao PDR			159,829	7,283,435	20	2,000	159,849	7,285,435			159,849	7,285,435
Malaysia	340	267,314	291,832	204,307,576			292,186	204,598,684	946,605	491,975,437	1,238,791	696,574,121
Myanmar												
Philippines			119	126,028			119	126,028			119	126,028
Singapore			88,360	62,684,000			135,434	97,660,000	217,159	126,544,000	352,593	224,204,000
Thailand	258.22	914,191			3,105.710	16,251,886	32,071	45,897,762	144,881	100,628,917	176,952	146,526,679
Vietnam												

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 41 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
Philippines	White Sugar	2010	211	484		1,800	640			588					745
		2011	661			702	680		650	614	555	572	566	596	622
		2012	567	636											602
Thailand	Raw Sugar	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	469	473	500	500	516	502	512	537	466	448	548	562	503
		2012	589	564	554	569									569
	White Sugar	2009	305	312	342	362	378	386	390	390	409	441	439	454	384
		2010	533	524	562	528	515	524	511	552	559	549	649	656	555
		2011	598	593	617	612	632	611	646	660	670	651	677	652	635
		2012	630	658	649	646									646

Table 42 CIF 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	316	348	383	382	318	357	380	141	451	504	591	587	397
		2010	578	685	768	637	578	449	578	520	476	549	540	676	586
		2011	734	679	761	756	712	667	633	668					701
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 pure sucrose	2009	350	387	341	307	387	341	402	370	385	429	424	511	386
		2010	437	556	660	492	515	462	464	427	464	405	474	466	485
		2011	597	536	747	489	709	543	501	607	564	414	484	537	561
		2012	584												

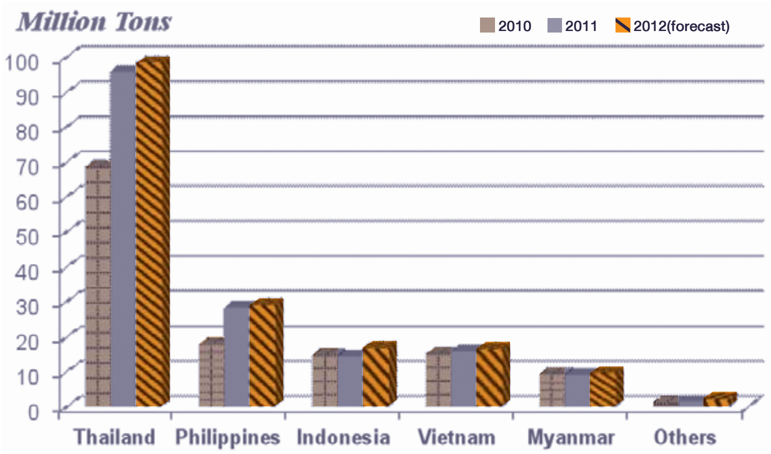


Figure 32 Sugarcane production of selected countries in ASEAN, 2010–2012

Figure 33 Sugarcane planted area of selected countries in ASEAN, 2010–2012

Figure 34 Sugarcane harvested area of selected countries in ASEAN, 2010–2012

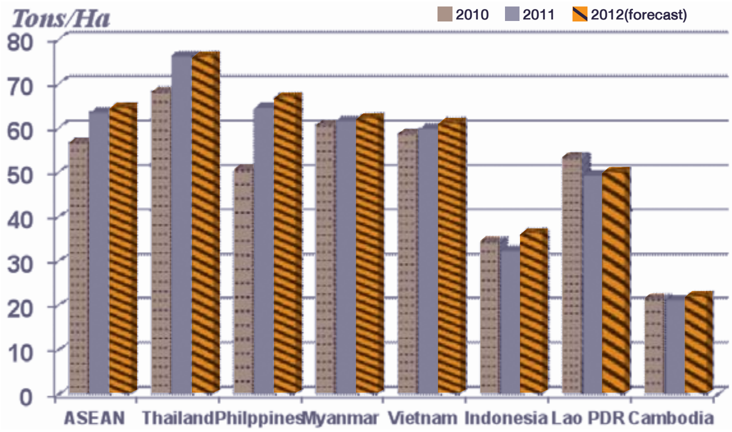


Figure 35 Sugarcane yield of selected countries in ASEAN, 2010–2012

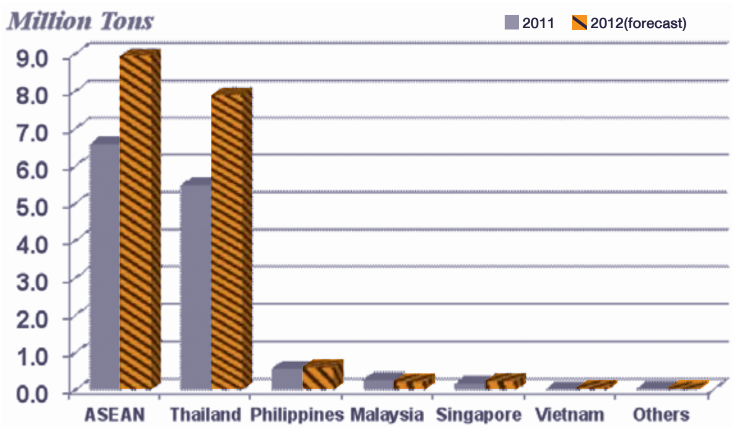


Figure 36 Amount of Sugar export (million tons) of selected countries in ASEAN in 2011–2012

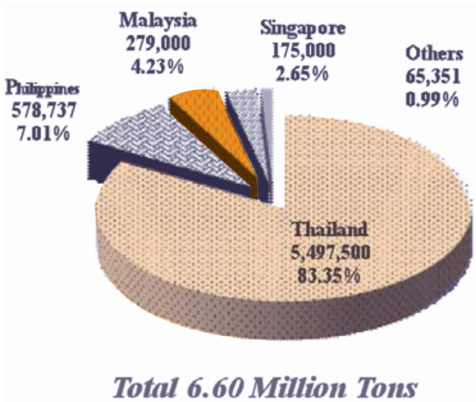


Figure 37 Share of sugar export (tons) among ASEAN countries, 2011

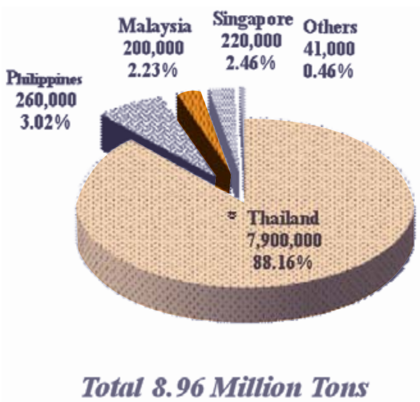


Figure 38 Share of sugar export (tons) among ASEAN countries, 2012

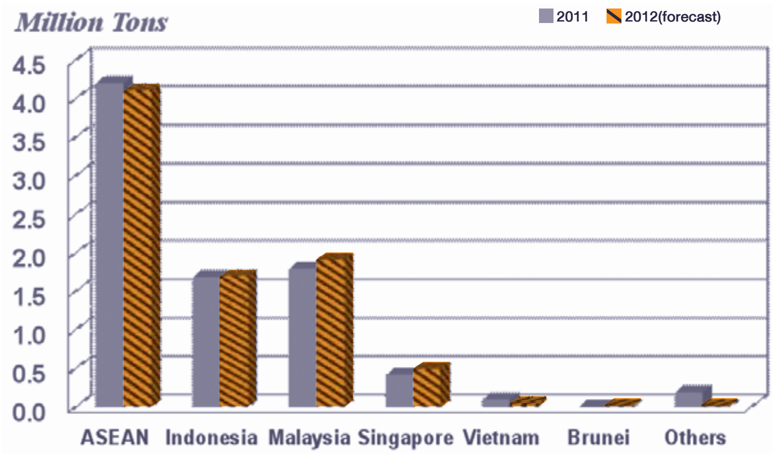


Figure 39 Amount of sugar import (million tons) by selected countries in ASEAN in 2011–2012

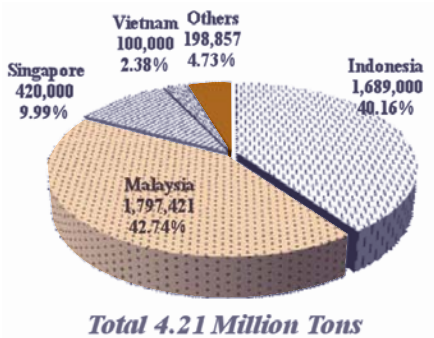


Figure 40 Share of sugar import (ton) among ASEAN countries, 2011 among

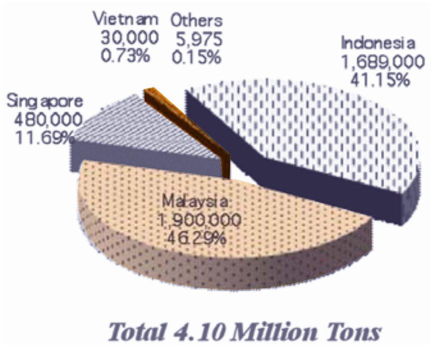


Figure 41 Share of sugar import (ton) among ASEAN countries, 2012

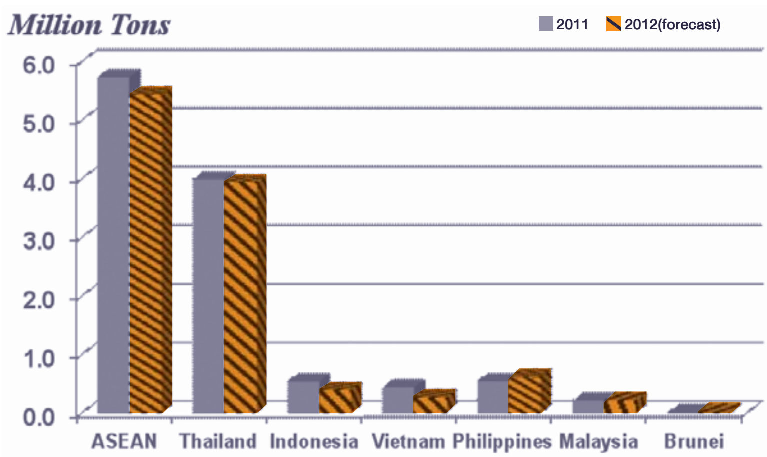


Figure 42 Amount of ending stock of Sugar in ASEAN countries

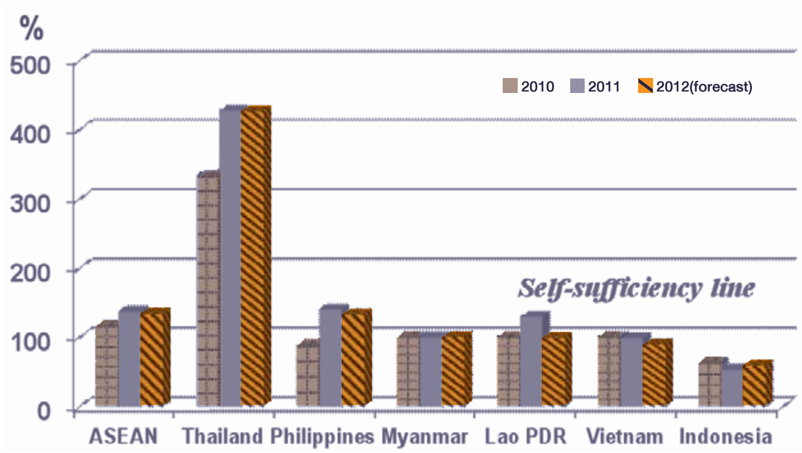


Figure 43 **Ratio of sugar production to domestic utilization in ASEAN countries, 2010–2012**

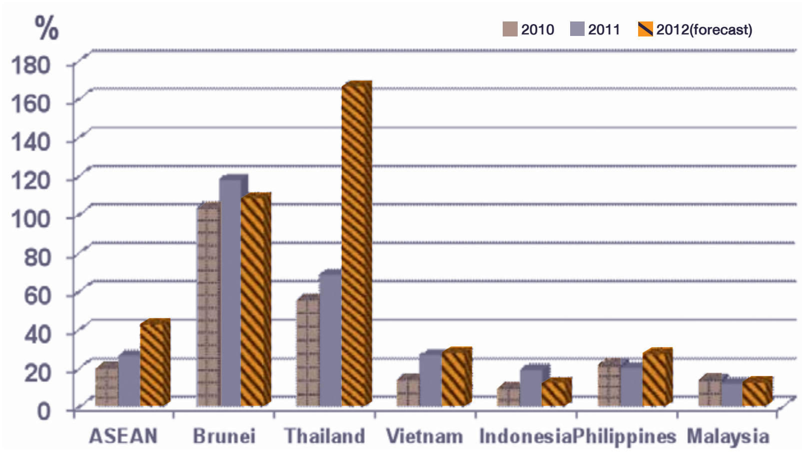


Figure 44 **Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2010–2012**

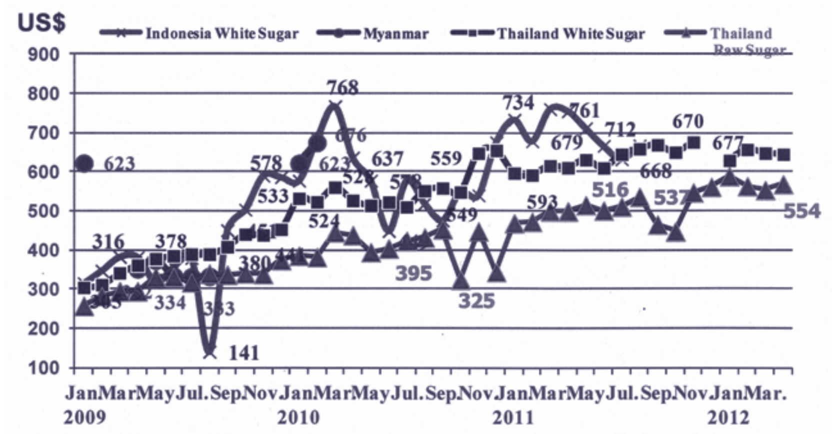


Figure 45 **FOB price (US$) of white sugar of selected countries in ASEAN in 2009–2012**

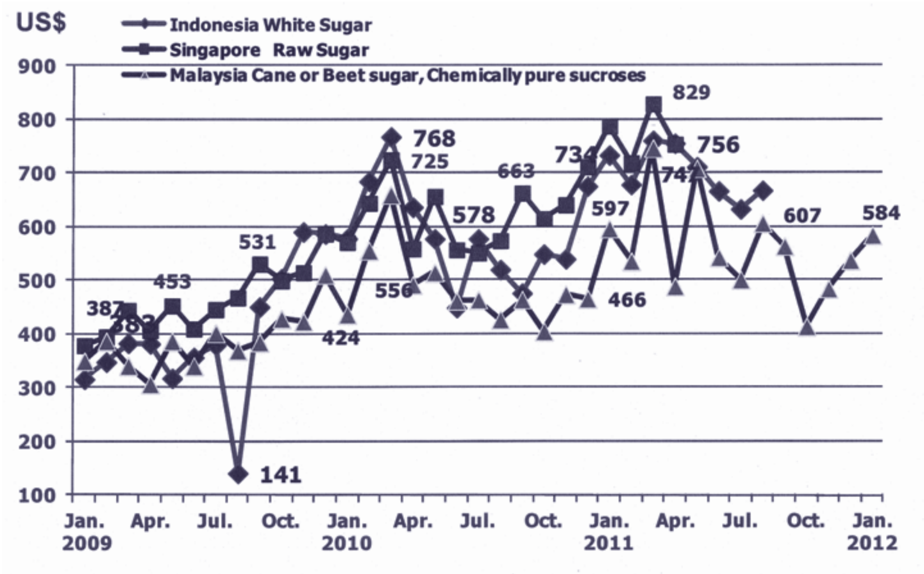


Figure 46 CIF price (US$) of white sugar of selected countries in ASEAN in 2009–2012

Highlights of Soybean Outlook for 2012

- Soybean supply in ASEAN is expected to decrease from 8.71 million tons in 2011 to 8.57 million tons in 2012, due to the decrease in production in Indonesia and Cambodia.
- The beginning stock in 2012 is estimated to be 0.20 million ton down 0.02 million ton compared to the previous year.
- The ASEAN export of soybeans, mainly from Cambodia, is expected to be 0.13 million ton in 2012 which is about the same as in 2011.
- The import of soybeans is also expected to decrease from 6.79 million tons in 2011 to 6.73 million tons in 2012.
- The production to domestic utilization ratio in 2012 is forecast to be 20 percent which is about the same as in 2011 indicates that the soybean production in ASEAN is very much lower than the domestic consumption requirement.
- The beginning stock to domestic utilization ratio is expected to be about 3 percent in 2012 which is about the same as the previous year. The very low value of the ratio of soybeans indicates that most countries keep very low stock.

Table 43 Summary of the ASEAN soybean situation, 2011–2012

Items	2011	2012	Change	
			Quantity	%
Supply (Million tons)	8.71	8.57	-0.14	-1.61
Beginning stock	0.22	0.20	-0.02	-9.09
Production	1.70	1.63	-0.07	-4.12
Import	6.79	6.73	-0.06	-0.88
Demand (Million tons)	8.71	8.57	-0.14	-1.61
Domestic utilization	8.38	8.10	-0.28	-3.34
Export	0.13	0.13	0.00	0.00
Ending stock	0.20	0.34	0.14	70.00
Ratio of production to domestic utilization (%)	20.25	20.15	-0.10	-
Ratio of beginning stock to domestic utilization (%)	2.62	2.50	-0.12	-

ASEAN Soybean Situation in 2011

Production

The soybean production in ASEAN in 2011 was estimated at 1.70 million tons, a decrease of 69,910 tons or 4 percent from 1.77 million tons in 2010. The decrease derived from the reduction in planted area while the yield is relatively unchanged (Table 44-47, Figure 47-50).

The contraction in production mostly came from the reduction in Indonesia, the biggest soybean producing country in the region, mainly due to the lower relative price compared to higher value crops such as horticulture. The decrease in production was also occurred in Vietnam, the second rank in the region, in terms of soybean production. The cause of the reduction was due to unfavorable weather and disease that affected the yield. For Cambodia, the production has decreased considerably due to the decrease in planted area a result of unfavorable weather and the decrease in soybean price. For Myanmar, the small increase in production was solely due to the increase in the yield that compensated the reduction in planted area. For Thailand, in general, there is a negative trend for soybean production due to the less net return of soybean compared to other crops. Lao PDR and the Philippines produced very little soybeans while Brunei and Singapore do not produce soybeans.

Utilization and Stock

In general, soybean grain is used for human consumption in the form of soybean oil, soybean milk, soybean sauces and soybean cake. The soybean meal, by product of soybean oil extraction, can be used for animal feed. In this report, soybean meal is also included in the balance sheet. The domestic utilization of soybeans in ASEAN in 2011 was estimated at 8.38 million tons, a decrease of 0.10 million ton from the previous year (Table 49). The 2011 beginning stock in ASEAN was estimated at 0.22 million ton compared to 0.16 million ton of the beginning stock in 2010. Thailand kept the most soybean stock in the region. The ratio of domestic production to total domestic utilization for the ASEAN in 2011 was estimated at 20 percent indicated that the domestic utilization very much rely on the import. Only Cambodia that have the production greater than the domestic utilization. For Lao PDR and Myanmar, the ratio are around 100 percent implied that these two countries are self – sufficient in soybeans. (Table 51, Figure 58).

The ratio of the beginning stock to the domestic utilization for the whole ASEAN in 2011 was estimated to be 3. Most countries, except Cambodia, have very low ratio (Table 52, Figure 59).

Trade

The 2011 soybeans exported from the ASEAN was 0.13 million ton. Cambodia is the major exporting country in the region which exported about 0.09 million ton representing about 71 percent of total ASEAN soybean export while the other countries are re-export (Table 49, Figure 51 and 52).

For import, the total soybean import in 2011 was reported to be 6.79 million tons, an decrease of 0.14 million ton compared to 6.93 million tons in the previous year. Three major importing countries in the region are Vietnam, Thailand and Indonesia respectively (Table 49, Figure 54 and 55).

The quantity and value of soybeans export by countries of destination and the quantity and value of import by countries of origin are given in table 53 and 54.

Prices

The FOB prices in Cambodia and Indonesia and CIF prices in Malaysia, Myanmar, the Philippines, Singapore and Thailand were reported. In general, the prices of soybean in 2011 are higher than in 2010 (Table 55 and 56, Figure 60). Since the grade is not specified in the report, the price compassion is not relevant.

Damaged Area

The total damaged area of soybeans in ASEAN in 2011 was reported to be 5,139 hectares of which 4,184 hectares caused by the drought and 955 hectares caused by the flood and the rest was not specified. The drought occurred in Thailand and Cambodia while the flood occurred only in Thailand (Table 48).

Prospects for Soybean in 2012

Production

Soybean production of ASEAN in 2012 is forecast to be 1.63 million tons, down 0.07 million ton or about 4 percent from the previous year. Only Myanmar, Philippines and Thailand that expect to have less production in 2012. The most increase, in terms of quantity, is predicted in Indonesia. In terms of percentage, the most increase is in Lao PDR. However, in general, the change in production whether increase or decrease is very small (Table 44-47, Figure 47-50).

Utilization and Stock

The domestic utilization of soybeans in the ASEAN is forecast to be 8.10 million tons in 2012, about 3 percent lower than the previous year (Table 49 and 50). The beginning stock in 2012 is estimated at 0.20 million ton, down 0.02 million ton

from the previous year. The production to domestic utilization ratio is predicted to be 20 percent in 2012 which is about the same as in 2011 (Table 51, Figure 58). For the beginning stock to domestic utilization ratio it is expected to be around 3 percent which is very low level (Table 52, Figure 59).

Trade

The export of soybean from the ASEAN region is projected to be 0.13 million ton in 2012 which is about the same as in 2011 (Table 49 and 50, Figure 510and 53). However, the total export is very small compared to the total import by the ASEAN (Table 49 and 50, Figure 54 and 56). All countries in ASEAN together are expected to import about 6.73 million tons of soybeans in 2012, down about 1 percent from 6.79 million tons in 2011.

Table 44 Soybean production in ASEAN countries, 2010–20112

Unit: 1,000 Tons

Country	2010 (2009/10)	2011 (2010/11)	change 2011over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	1,766.82	1,696.91	-69.91	-3.96	1,631.68	-65.23	-3.84
Brunei	-	-	-	-	-	-	-
Cambodia	156.59	114.60	-41.99	-26.81	116.00	1.40	1.22
Indonesia	907.03	843.84	-63.19	-6.97	874.03	30.19	3.58
Lao PDR	11.44	13.82	2.39	20.86	17.63	3.81	27.53
Malaysia	-	-	-	-	-	-	-
Myanmar	253.68	254.52	0.84	0.33	148.97	-105.55	-41.47
Philippines	0.81	0.81	0.00	0.00	0.64	-0.17	-20.49
Singapore	-	-	-	-	-	-	-
Thailand	169.58	151.42	-18.15	-10.70	151.41	-0.01	-0.01
Vietnam	267.70	317.90	50.20	18.75	323.00	5.10	1.60

Table 45 Soybean planted area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	1,248.44	1,186.55	-61.88	-4.96	1,190.73	4.17	0.35
Brunei	-	-	-	-	-	-	-
Cambodia	103.20	70.58	-32.62	-31.61	70.00	-0.58	-0.82
Indonesia	673.26	620.93	-52.33	-7.77	634.50	13.57	2.19
Lao PDR	7.24	9.15	1.92	26.47	10.50	1.35	14.75
Malaysia	-	-	-	-	-	-	-
Myanmar	170.90	169.00	-1.90	-1.11	157.50	-11.50	-6.81
Philippines	0.58	0.46	-0.12	-20.41	0.46	0.00	0.00
Singapore	-	-	-	-	-	-	-
Thailand	105.67	91.83	-13.83	-13.09	90.78	-1.06	-1.15
Vietnam	187.60	224.60	37.00	19.72	227.00	2.40	1.07

Table 46 **Soybean harvested area in ASEAN countries, 2010–2012**

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	1,231.56	1,181.42	-50.14	-4.07	1,185.95	4.53	0.38
Brunei	-	-	-	-	-	-	-
Cambodia	101.78	69.20	-32.58	-32.01	68.40	-0.80	-1.16
Indonesia	660.82	620.93	-39.90	-6.04	634.50	13.57	2.18
Lao PDR	7.24	9.15	1.92	26.47	10.50	1.35	14.75
Malaysia	-	-	-	-	-	-	-
Myanmar	170.90	169.00	-1.90	-1.11	157.50	-11.50	-6.81
Philippines	0.58	0.46	-0.12	-20.41	0.46	-0.01	-1.94
Singapore	-	-	-	-	-	-	-
Thailand	102.64	88.08	-14.56	-14.19	87.60	-0.48	-0.54
Vietnam	187.60	224.60	37.00	19.72	227.00	2.40	1.07

Table 47 **Soybean yield in ASEAN countries, 2010–2012**

Unit: Ton/Hectare

Country	2010 (2009/10)	2011 (2010/11)	change 2011over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	1.435	1.436	0.00	0.12	1.376	-0.06	-4.21
Brunei	-	-	-	-	-	-	-
Cambodia	1.538	1.656	0.12	7.64	1.696	0.04	2.41
Indonesia	1.373	1.359	-0.01	-0.99	1.378	0.02	1.36
Lao PDR	1.581	1.511	-0.07	-4.38	1.679	0.17	11.07
Malaysia	-	-	-	-	-	-	-
Myanmar	1.484	1.506	0.02	1.46	0.946	-0.56	-37.20
Philippines	1.393	1.746	0.35	25.34	1.415	-0.33	-18.92
Singapore	-	-	-	-	-	-	-
Thailand	1.652	1.719	0.07	4.06	1.728	0.01	0.53
Vietnam	1.427	1.415	-0.01	-0.81	1.423	0.01	0.53

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

Table 48 **Soybean damaged area in ASEAN by cause of damage, 2011**

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Unspecified	Total
ASEAN	955	4,184	-	-	-	5,139
Brunei	-	-	-	-	-	-
Cambodia	-	1,386	-	-	-	1,386
Indonesia	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-
Philippines	-	-	-	-	-	-
Singapore	-	-	-	-	-	-
Thailand	955	2,798	-	-	-	3,753
Vietnam	-	-	-	-	-	-

Table 49 Soybean balance sheet of ASEAN countries, 2011

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	219,747	1,696,912	6,794,983	8,711,642	8,380,504	129,011	202,127	8,711,642
Brunei	n.a.	-	1,018	1,018	1,018	0	0	1,018
Cambodia	8,165	114,600	0	122,765	24,066	91,682	7,017	122,765
Indonesia	27,779	843,838	1,440,659	2,312,276	2,296,000	5,920	10,356	2,312,276
Lao PDR	n.a.	13,820	n.a.	13,820	13,820	n.a.	n.a.	13,820
Malaysia	0	-	637,286	637,286	608,658	28,628	n.a.	637,286
Myanmar	0	254,520	0	254,520	254,520	0	0	254,520
Philippines	0	810	51,642	52,452	52,422	30	n.a.	52,452
Singapore	0	-	20,000	20,000	20,000	0	0	20,000
Thailand	183,603	151,424	1,994,378	2,329,405	2,142,000	2,751	184,654	2,329,405
Vietnam1/	200	317,900	2,650,000	2,968,100	2,968,000	nil	100	2,968,100

Table 50 Soybean balance sheet of ASEAN countries, 2012

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	202,127	1,631,680	6,734,041	8,567,848	8,097,194	130,545	341,109	8,568,848
Brunei	n.a.	-	1,049	1,049	1,049	0	0	1,049
Cambodia	7,017	116,000	0	123,017	26,680	92,860	3,477	123,017
Indonesia	10,356	874,032	1,440,659	2,325,047	2,167,259	5,920	151,868	2,325,047
Lao PDR	n.a.	17,625	n.a.	17,625	17,625	n.a.	n.a.	17,625
Malaysia	n.a.	-	511,333	511,333	481,068	30,265	n.a.	511,333
Myanmar[1/]	0	148,969	0	148,969	148,969	0	0	148,969
Philippines[1/]	0	644	100,000	100,644	100,644	n.a.	n.a.	100,644
Singapore	0	-	20,000	20,000	20,000	-	0	20,000
Thailand	184,654	151,410	1,961,000	2,297,064	2,111,000	1,500	184,564	2,297,064
Vietnam[1/]	100	323,000	2,700,000	3,023,100	3,022,900	nil	200	3,023,100

Note: [1/] The value is estimated by AFSIS Project, n.a. = not available, nil = very small amount and the value of 2012 is forecasting value

Table 51 Ratio of soybean production to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	1,766,824	8,482,668	20.83	1,696,912	8,380,504	20.25	1,631,680	8,097,194	20.15
Brunei	–	989	0	–	1,018	0	–	1,049	0
Cambodia	156,589	32,885	476.17	114,600	24,066	476.19	116,000	26,680	434.78
Indonesia	907,031	2,616,000	34.67	843,838	2,296,000	36.75	874,032	2,167,259	40.33
Lao PDR	11,435	11,435	100.00	13,820	13,820	100.00	17,625	17,625	100.00
Malaysia	–	618,282	0	–	608,658	0	–	481,068	0
Myanmar	253,680	253,680	100.00	254,520	254,520	100.00	148,969	148,969	100.00
Philippines	812	110,740	0.73	810	52,422	1.55	644	100,644	0
Singapore	–	16,525	0	–	20,000	0	–	20,000	0
Thailand	169,577	1,954,332	8.68	151,424	2,142,000	7.07	151,410	2,111,000	7.17
Vietnam	267,700	2,867,800	9.33	317,900	2,968,000	10.71	323,000	3,022,900	10.69

Table 52 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	156,342	8,482,668	1.84	219,747	8,380,504	2.62	202,127	8,097,194	2.50
Brunei	n.a.	989	0	n.a.	1,018	0	n.a.	1,049	0
Cambodia	5,035	32,885	15.31	8,165	24,066	33.93	7,017	26,680	26.30
Indonesia	400	2,616,000	0.02	27,779	2,296,000	1.21	10,356	2,167,259	0.48
Lao PDR	n.a.	11,435	0	n.a.	13,820	0	n.a.	17,625	0
Malaysia	0	618,282	0	0	608,658	0	n.a.	481,068	0
Myanmar	0	253,680	0	0	254,520	0	0	148,969	0
Philippines	0	110,740	0	0	52,422	0	0	100,644	0
Singapore	0	16,525	0	0	20,000	0	0	20,000	0
Thailand	150,607	1,954,332	7.71	183,603	2,142,000	8.57	184,654	2,111,000	8.75
Vietnam	300	2,867,800	0.01	200	2,968,000	0.01	100	3,022,900	0

Table 53 Quantity and Value of Soybean Export by Countries of Destination in 2011

Quantity: Tons Values: US$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia	314,026	480,340							237,633	387,938	76,000	106,592	83,505	91,270
Lao PDR														
Malaysia					21,320	12,521,245							2	1,668
Myanmar														
Philippines														
Singapore					285	180,000			163	132,000				
Thailand			1,530.88	579,484	75.000	116,430	0.010	162					120	168,604
Vietnam														

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	152,309	248,229	20	20	29	189	863,522	1,314,578	5,056,275	6,423,789	5,919,797	7,738,367
Lao PDR												
Malaysia	944	708,026			6,042	3,781,969	28,308	17,012,908	321	187,253	28,628	17,200,161
Myanmar												
Philippines	1,205	2,146					1,205	2,146	53,113	110,500	54,318	112,646
Singapore					40	36,000	488	348,000	45	54,000	533	402,000
Thailand	12	23,066			477.1	341,841	2,215	1,229,587	414	611,374	2,629	1,840,961
Vietnam										79,328		79,328

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 54 Quantity and Value of Soybean Import by Countries of Origin in 2011

Quantity: Tons Values: US$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									88,883	93,008,112				
Lao PDR														
Malaysia					200	48,747								
Myanmar														
Philippines														
Singapore									656	508,000				
Thailand			14,528	3,404,119	0.01	21	215	105,757	0.02	74	31	10,615		
Vietnam				171,924				50,000		11,327				

Importing Country	Country of origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	2,629	2,876,108	4,156	3,153,310	0.18	756	95,668	99,038,286	1,344,991	779,738,479	1,440,659	878,776,765
Lao PDR												
Malaysia	20	15,058					220	63,805	637,066	383,389,935	637,286	383,453,739
Myanmar												
Philippines	140	702					140	702	21,944	12,103	22,084	12,805
Singapore							656	508,000	16,402	11,250,000	17,058	11,758,000
Thailand					0.01	11	14,773	3,520,597	1,979,604	1,123,062,303	1,994,378	1,126,582,900
Vietnam		41,286		413,783		688,320		1,376,640		404,346,706	0	405,723,346

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 55 FOB Price of soybean in selected ASEAN countries

Unit: US$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia		2010	523	523	500	523	523	500	523	500	500	476	452	476	502
		2011	520	530	510	525	515	510	515	525	500	480	460	475	505
		2012	497	525	530	534	542								526
Indonesia		2010	1,012	1,100	1,175	1,049	1,174	1,277	1,159	1,160	1,173	1,276	1,143	1,160	1,155
		2011	1,249	1,281	1,352	1,290	1,314	1,434	1,270	1,243	1,376	1,475	1,167	1,248	1,308

Table 56 CIF Price of soybean in selected ASEAN countries

Unit: US$/Ton

Country	Grade	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	501	393	500	473	492	476	514	493	509	543	559	610	505
		2011	603	668	632	630	596	614	590	708	654	584	602	483	614
		2012	530												
Myanmar		2009	194	197	239	198	176	194	212	182	210	206	280	235	210
		2010	213	193	181	187	208	196		352					219
Philippines		2010	350	290	280	250	210	190	400	420	480	300	410	350	328
		2011	510	460	600	590	590	610	570	580					564
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	425	412	416	466	482	494	479	462	455	449	473
		2010	477	459	477	438	431	426	436	438	461	451	466	476	453
		2011	517	574	586	594	574	574	583	578	566	566	538	530	565
		2012	516	561	524										534

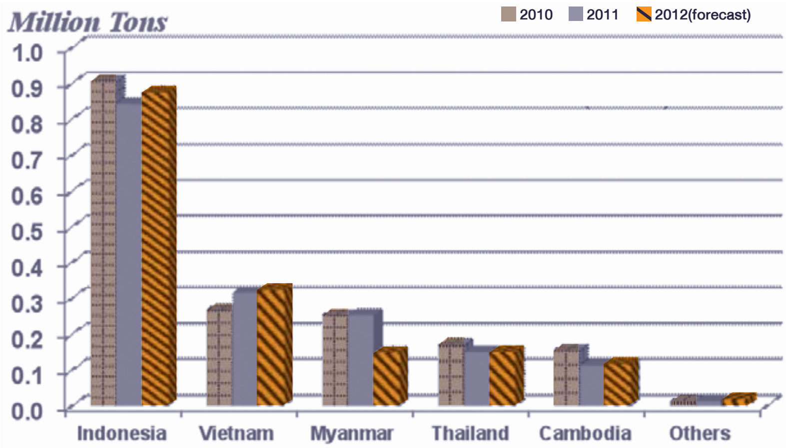


Figure 47 Soybean production of selected countries in ASEAN, 2010–2012

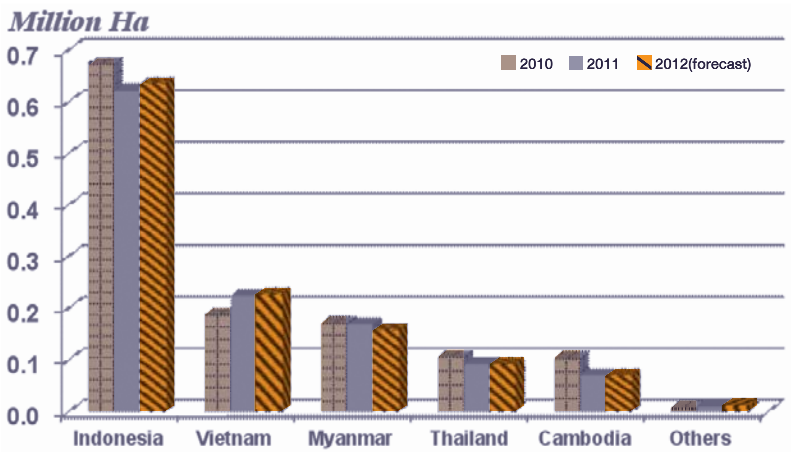


Figure 48 Soybean planted area of selected countries in ASEAN, 2010–2012

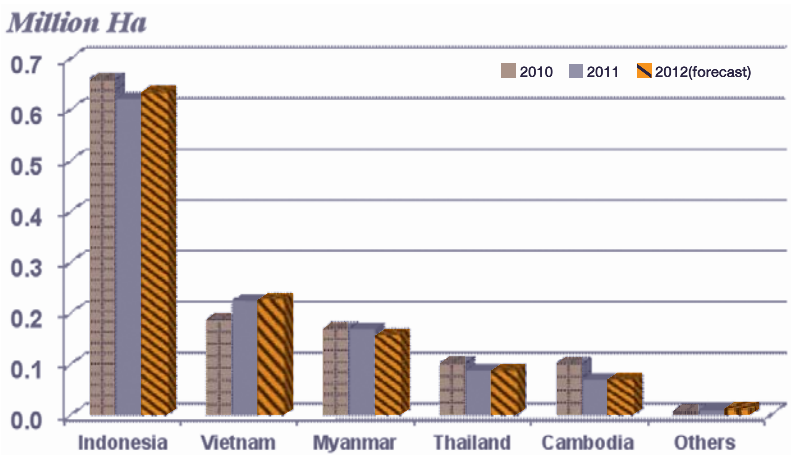


Figure 49 Soybean harvested area of selected countries in ASEAN, 2010–2012

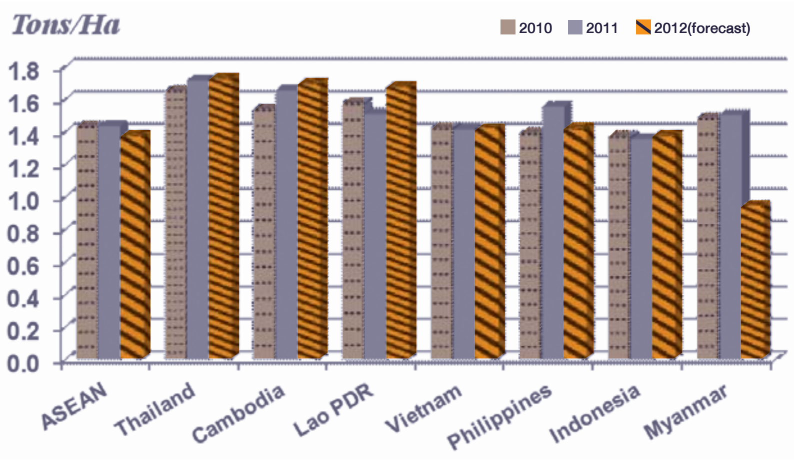


Figure 50 Soybean yield of countries in ASEAN, 2010–2012

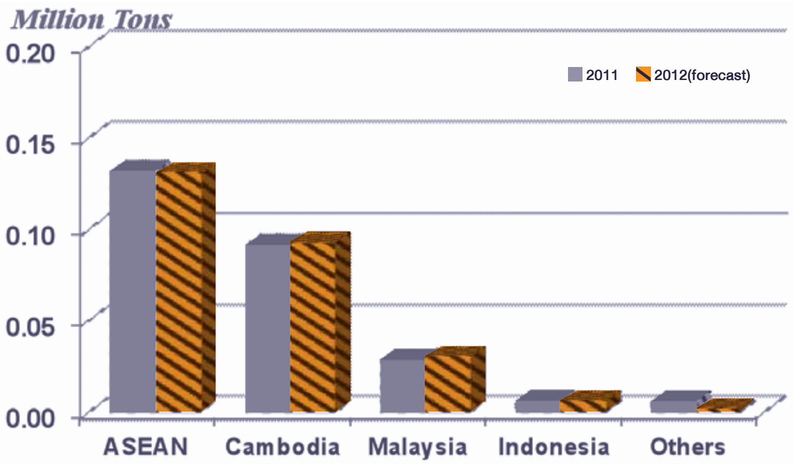


Figure 51 Amount of Soybean export (million tons) of selected countries

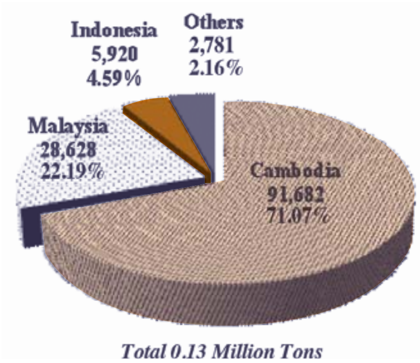


Figure 52 Share of Soybean export (ton) among ASEAN countries, 2011

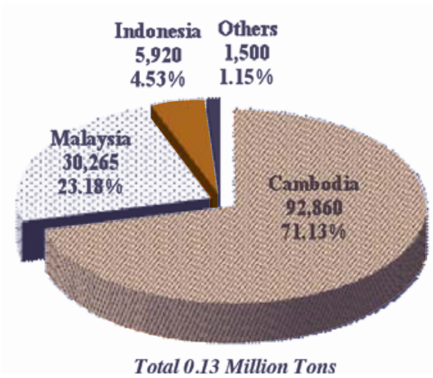


Figure 53 Share of Soybean export (ton) among ASEAN countries, 2012

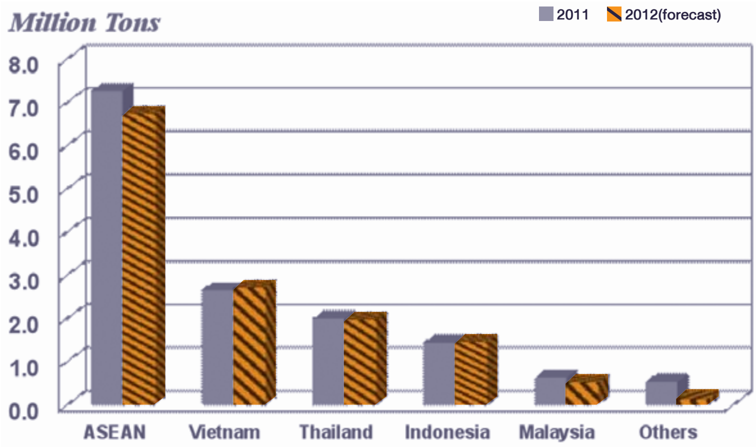


Figure 54 Amount of soybean import (million tons) by selected countries in ASEAN in 2011–2012

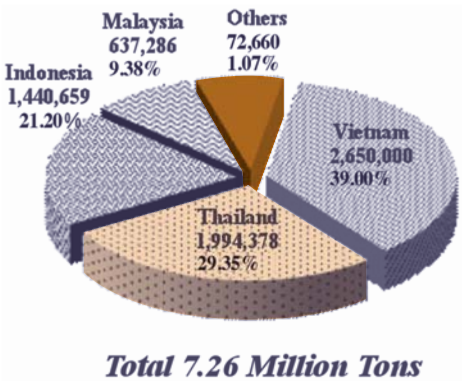


Figure 55 Share of Soybean import (ton) among ASEAN countries, 2011

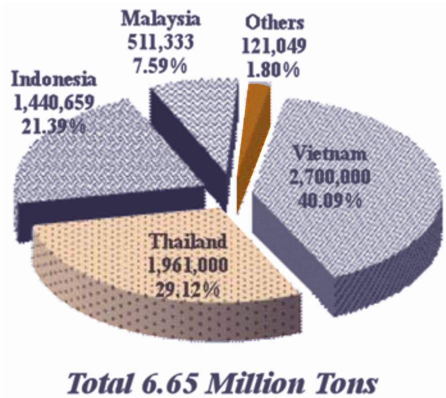


Figure 56 Share of soybean import (ton) among ASEAN countries, 2012

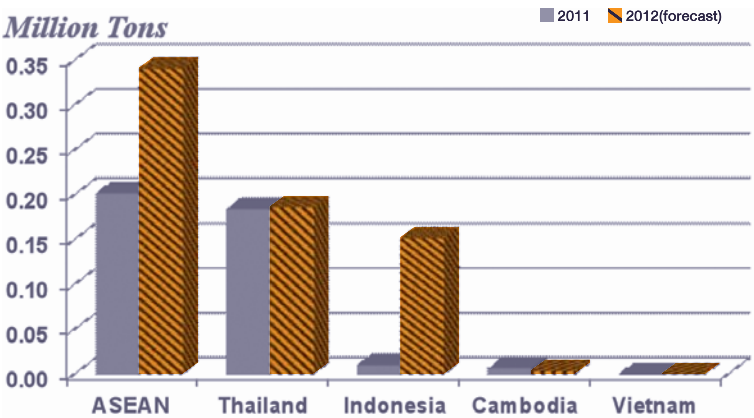


Figure 57 Amount of ending stock of soybean in ASEAN countries in 2011–2012

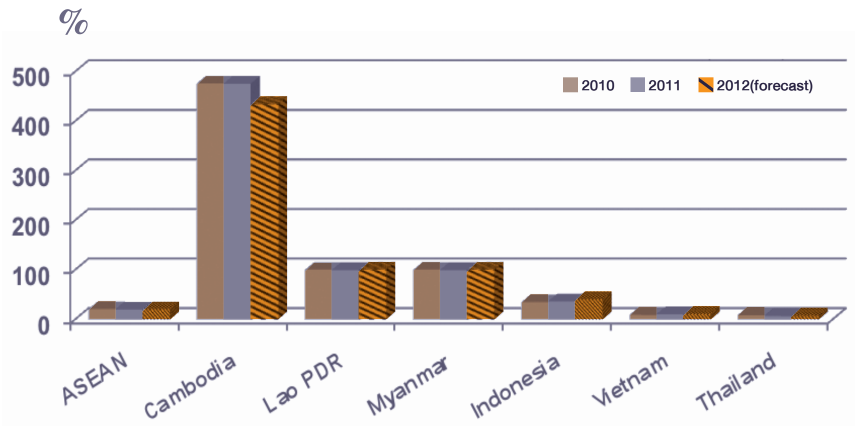


Figure 58 Ratio of soybean production to domestic utilization in ASEAN countries, 2010–2012

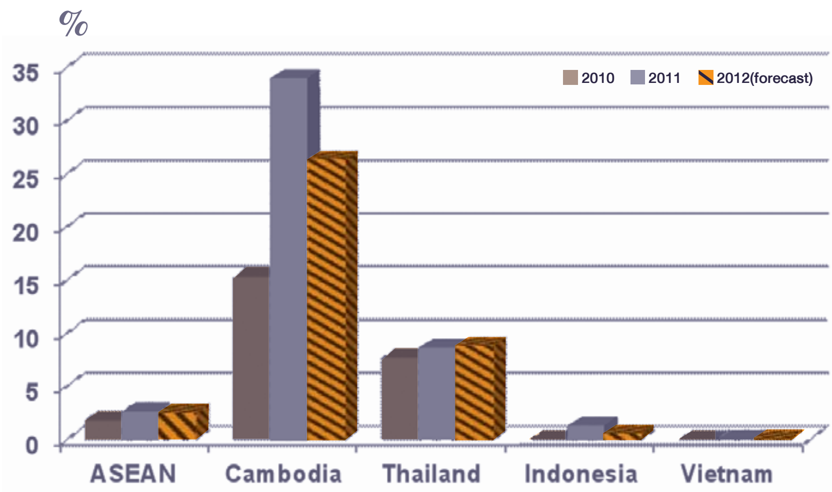


Figure 59 Ratio of soybean beginning stock to domestic utilization in ASEAN countries , 2010–2012

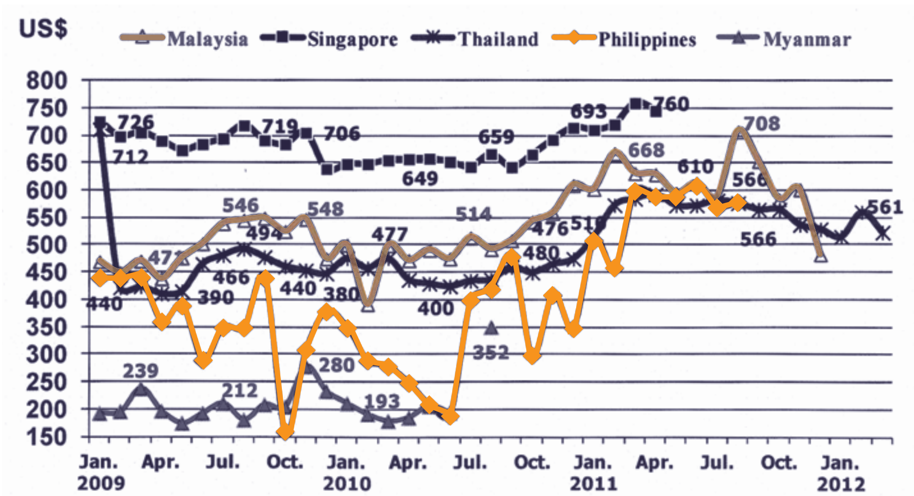


Figure 60 CIF price (US$) of soybean of selected countries in ASEAN in 2009–2012

Highlights of Cassava Outlook for 2012

- The supply of cassava in ASEAN is expected to increase from 74.33 million tons to 76.74 million tons which come from the increase in production in Indonesia and Thailand, the two largest cassava producing countries in the region.
- The increase in production derives from the increase in both area and yield. The factors contributing to the increase in area and yield are the cassava prices in previous year and the weather condition.
- The beginning stock of cassava in 2012 is estimated at 3.07 million tons which is about 40 about lower than 6.20 million tons in 2011 due to the reduction in stock in Thailand and Indonesia.
- The production to domestic utilization ratio in 2012 is predicted to be 154 percent which is in a good situation as the previous year.
- The beginning stock to domestic utilization ratio in 2012 is forecast to be about 7 percent which is very low due to the small stock therefore it is very risky in shortage of cassava supply in certain month even though, aggregately, the total supply is sufficient.

Table 57 Summary of the ASEAN cassava situation, 2011–2012

Items	2011	2012	Change	
			Quantity	%
Supply (Million tons)	74.33	76.74	2.41	3.24
Beginning stock	6.20	3.07	-3.13	-50.48
Production	67.21	72.55	5.34	7.95
Import	0.91	1.13	0.22	24.18
Demand (Million tons)	74.33	76.74	2.41	3.24
Domestic utilization	44.12	47.07	2.95	6.69
Export	27.14	27.99	0.85	3.13
Ending stock	3.07	1.68	-1.39	-45.28
Ratio of production to domestic utilization (%)	152.34	154.12	1.78	-
Ratio of beginning stock to domestic utilization (%)	14.06	6.51	-7.55	-

ASEAN Cassava Situation in 2011

Production

The estimated production of cassava (roots fresh) in ASEAN in 2011 (crop year 2010/11) was 67.21 million tons, up about 5.32 million ton or about 9 percent from 61.89 million tons in 2010. The increase, aggregately, due to the increase in both harvested area and yield. There are only two large producing counties in the region namely, Indonesia and Thailand respectively. Two countries together produced about 68 percent of the total production in ASEAN (Table 58-61, Figure 61-64).

The estimated cassava production in Indonesia in 2011 was slightly less than in 2010 due to the decline in planted area of the third crop as a result of unfavorable weather and competing with other crops.

For Thailand, the contraction of the production came from the decline in area planted. The planted area was affected by the lack of plant stock due to the damage caused by the pests in the previous year and the increase in the price of competing crops. The yield was slightly increased. In Vietnam, the production was estimated to increase significantly from 8.60 million tons in 2010 to 9.66 million tons in 2012 due to the increase in the yield even though the planted area decreased. The increase in yield was very eminent from 17.26 tons per hectare to 24.87 tons per hectare as a result of using more improved varieties. For the Philippines, the cassava production was also estimated to increase. The increase derived from the increase in both area and yield. The increase in area was due to the increase in demand for industrial purposes while the increase in yield was the result of using more improved varieties. For Cambodia, the increase in production has derived from both the expansion in area and the increase in the yield. The farmers' response to price increase and price of competing crop decrease were the two main factors led to the increase in planted area considerably from previous year. The rise in yield was due to the farmers applied more fertilizer as well as the favorable weather.

Utilization and stock

Cassava in ASEAN, in general, can be used for human food, animal feed as well as for producing ethanol. The domestic utilization of cassava for all purposes (roots fresh) in ASEAN in 2011 was estimated at 44.12 million tons, 2.19 million tons higher than the previous year (Table 63). The beginning stock of the year 2011 was estimated to be 6.20 million tons. The ratio of the production to the domestic utilization in 2011 was estimated at 152 percent indicated that ASEAN as a whole can produce 52 percent more than domestic consumption (Table 65, Figure 72).

The ratio of beginning stock to the domestic utilization for the ASEAN was estimated to be 14 percent (Table 66, Figure 73).

Trade

In 2011 cassava exported from ASEAN was reported to be 27.14 million tons compared to 25.61 million tons in 2010, an increase of 1.53 million tons or about 6 percent. Thailand was the number one cassava exporting country, followed by Vietnam and Cambodia respectively. For other countries, the export quantity was very small or no export at all (Table 63, Figure 65 and 66).

For the import, the total import in 2011 was 0.91 million ton of which 0.58 million ton or 64 percent imported by Thailand and followed by Indonesia and Singapore respectively (Table 63, Figure 68 and 69).

The quantity and value of cassava export by countries of destination and the quantity and value of import by countries of origin are given in table 67 and 68.

Prices

The FOB prices of cassava in the form of flour, shredded, pellets and starch of Cambodia, Indonesia, the Philippines and Thailand between 2009-2012 and the CIF prices in Indonesia and the Philippines are shown in Table 69-70. In general, the average FOB prices of all products from Thailand in 2011 were higher than in 2010.

Damaged Area

The cassava damaged area in 2011 in ASEAN was reported to be 71,588 hectares. The cause of the damage mostly came from the drought and the flood. For the drought, the damaged area was 48,636 hectares and has occurred only in Thailand. For the damage caused by the flood, it was reported to be 22,196 hectares and has occurred only in Cambodia (Table 62).

Prospects for Cassava in 2012

Production

The cassava production in ASEAN in 2012 is forecast to be 72.55 million tons which is about 8 percent increase compared to 67.21 million tons in 2011. The increase in production comes from the expected increase in both area and yield. The most increase will come from Indonesia and Thailand, the two biggest cassava producing countries. The reasons for the increase in production are the increase in price received by the farmers and the good weather is expected in both countries (Table 58-61, Figure 61-64).

Utilization and Stock

The domestic utilization of cassava in ASEAN in 2012 is predicted to be increase to 47.07 million tons, about 7 percent increase from the previous year due to the increase in demand for ethanol. The beginning stock in 2012 is estimated to be 3.07 million tons or about 50 percent decrease from the previous year due to the increase in domestic utilization and export (Table 64).

The production to domestic utilization ratio for 2012 is expected to be 154 percent which is slightly increase from the previous year (Table 65, Figure 72). The beginning stock to domestic utilization ratio is forecast to be about 7 percent which is very risky in shortage of cassava supply (Table 66, Figure 73).

Trade

The cassava export in 2012 is expected to be higher than in 2011 due to the increase in supply. About 27.99 million tons is forecast for the cassava export from the ASEAN compared to 27.14 million tons in 2011 (Table 64, Figure 65 and 67). For the import, it is expected to increase from 0.91 million ton in 2011 to 1.13 million tons in 2012 due to the increase in import by Thailand. (Table 64, Figure 68 and 70).

Table 58 Cassava production in ASEAN countries, 2010–2012

Unit: 1,000 Tons

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	61,885.02	67,209.69	5,324.67	8.60	72,545.03	5,335.34	7.94
Brunei	0.21	0.14	-0.07	-33.44	0.16	0.02	16.00
Cambodia	4,248.94	8,033.84	3,784.90	89.08	8,300.00	266.16	3.31
Indonesia	23,918.12	24,009.62	91.51	0.38	25,449.54	1,439.92	6.00
Lao PDR	500.09	743.19	243.10	48.61	784.00	40.81	5.49
Malaysia	37.19	39.05	1.86	5.00	41.00	1.95	5.00
Myanmar	477.68	607.10	129.42	27.09	729.92	122.82	20.23
Philippines	2,101.45	2,200.54	99.08	4.71	2,277.60	77.06	3.50
Singapore	-	-	-	-	-	-	-
Thailand	22,005.74	21,912.42	-93.32	-0.42	24,847.81	2,935.39	13.40
Vietnam	8,595.60	9,663.80	1,068.20	12.43	10,115.00	451.20	4.67

Table 59 Cassava planted area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	3,395.57	3,447.01	51.43	1.51	3,582.59	135.59	3.93
Brunei	-	-	-	-	-	-	-
Cambodia	206.23	391.71	185.48	89.94	392.00	0.29	0.07
Indonesia	1,183.05	1,182.64	-0.41	-0.03	1,230.57	47.93	4.05
Lao PDR	19.94	31.14	11.20	56.14	32.00	0.86	2.78
Malaysia	2.77	2.91	0.14	4.98	3.05	0.15	5.02
Myanmar	40.98	44.99	4.00	9.76	56.54	11.55	25.68
Philippines	217.62	221.11	3.49	1.60	224.20	3.09	1.40
Singapore	-	-	-	-	-	-	-
Thailand	1,226.99	1,184.02	-42.96	-3.50	1,249.23	65.21	5.51
Vietnam	498.00	388.50	-109.50	-21.99	395.00	6.50	1.67

Table 60 Cassava harvested area in ASEAN countries, 2010–2012

Unit: 1,000 Hectares

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	3,342.61	3,375.43	32.82	0.98	3,478.34	102.91	3.05
Brunei	-	-	-	-	-	-	-
Cambodia	202.49	369.52	167.03	82.49	379.00	9.48	2.57
Indonesia	1,183.05	1,182.64	-0.41	-0.03	1,230.57	47.93	4.05
Lao PDR	19.94	31.14	11.20	56.14	32.00	0.86	2.78
Malaysia	2.05	2.15	0.10	4.88	2.26	0.11	5.02
Myanmar	34.63	44.99	10.36	29.92	56.54	11.55	25.68
Philippines	217.62	221.11	3.49	1.60	224.20	3.09	1.40
Singapore	-	-	-	-	-	-	-
Thailand	1,184.83	1,135.39	-49.44	-4.17	1,158.77	23.38	2.06
Vietnam	498.00	388.50	-109.50	-21.99	395.00	6.50	1.67

Note: Vietnam reported only planted area.

Table 61 Cassava yield in ASEAN countries, 2010–2012

Unit: Ton/Hectare

Country	2010 (2009/10)	2011 (2010/11)	change 2011 over 2010		2012 (2011/12)	change 2012 over 2011	
			Quantities	(%)		Quantities	(%)
ASEAN	18.51	19.91	1.40	7.56	20.86	0.95	4.77
Brunei	–	–	–	–	–	–	–
Cambodia	20.98	21.74	0.76	3.62	21.90	0.16	0.74
Indonesia	20.22	20.30	0.08	0.40	20.68	0.38	1.87
Lao PDR	25.08	23.87	-1.21	-4.82	24.50	0.63	2.64
Malaysia	18.13	18.15	0.02	0.11	18.15	0.00	0.00
Myanmar	13.80	13.50	-0.30	-2.17	12.91	-0.59	-4.37
Philippines	9.66	9.95	0.29	3.00	10.16	0.21	2.11
Singapore	–	–	–	–	–	–	–
Thailand	18.57	19.30	0.73	3.93	21.44	2.14	11.09
Vietnam	17.26	24.87	7.61	44.09	25.61	0.74	2.98

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

Table 62 Cassava damaged area in ASEAN by cause of damage, 2011

Country	Cause of Damage (Hectares)					
	Flood	Drought	Pests	Diseases	Unspecified	Total
ASEAN	22,196	48,636	–	–	756	71,588
Brunei	–	–	–	–	–	–
Cambodia	22,196	–	–	–	–	22,196
Indonesia	–	–	–	–	–	–
Lao PDR	–	–	–	–	–	–
Malaysia	–	–	–	–	756	756
Myanmar	–	–	–	–	–	–
Philippines	–	–	–	–	–	–
Singapore	–	–	–	–	–	–
Thailand	–	48,636	–	–	–	48,636
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Table 63 Cassava (roots fresh) balance sheet of ASEAN countries, 2011

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	6,202,668	67,209,696	912,693	74,325,057	44,116,816	27,142,828	3,065,413	74,325,057
Brunei	0	140	22	162	162	0	0	162
Cambodia	0	8,033,843	0	8,033,843	5,864,705	2,169,138	0	8,033,843
Indonesia	128,318	24,009,624	141,571	24,279,513	23,464,000	130,980	684,533	24,279,513
Lao PDR	n.a.	743,190	10,805	753,995	673,328	80,667	n.a.	753,995
Malaysia	0	39,047	16	39,063	38,883	95	85	39,063
Myanmar[1/]	0	607,099	3,300	610,399	610,399	0	0	610,399
Philippines	0	2,200,537	76,000	2,276,537	2,275,439	1,098	0	2,276,537
Singapore[1/]	0	-	100,000	100,000	99,900	100	0	100,000
Thailand	6,000,000	21,912,416	580,979	28,493,395	6,590,000	19,597,000	2,306,395	28,493,395
Vietnam	74,350	9,663,800	0	9,738,150	4,500,000	5,163,750	74,400	9,738,150

Table 64 Cassava (roots fresh) balance sheet of ASEAN countries, 2012

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	3,065,413	72,547,029	1,128,691	76,741,133	47,073,241	27,986,480	1,681,412	76,741,133
Brunei[1/]	0	163	4	167	167	0	0	167
Cambodia	0	8,300,000	0	8,300,000	6,059,000	2,241,000	0	8,300,000
Indonesia	684,533	25,449,541	0	26,134,074	25,449,541	0	684,533	26,134,074
Lao PDR	n.a.	784,000	n.a.	784,000	784,000	n.a.	n.a.	784,000
Malaysia	85	40,998	16	41,099	40,826	95	178	41,099
Myanmar[1/]	0	729,919	0	729,919	729,919	0	0	729,919
Philippines[1/]	0	2,279,602	28,671	2,308,273	2,306,888	1,385	0	2,308,273
Singapore[1/]	0	-	100,000	100,000	99,900	100	0	100,000
Thailand	2,306,395	24,847,806	1,000,000	28,154,201	7,103,000	20,579,000	472,201	28,154,201
Vietnam[1/]	74,400	10,115,000	0	10,189,400	4,500,000	5,164,900	524,500	10,189,400

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

Table 65 Ratio of cassava production to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	61,885,022	41,933,485	147.58	67,209,696	44,116,816	152.34	72,547,029	47,073,241	154.12
Brunei	211	213	99.10	140	162	86.69	163	167	97.66
Cambodia	4,248,942	2,676,834	158.73	8,033,843	5,864,705	136.99	8,300,000	6,059,000	136.99
Indonesia	23,918,118	23,917,000	100.00	24,009,624	23,464,000	102.33	25,449,541	25,449,541	100.00
Lao PDR	500,090	500,090	100.00	743,190	673,328	110.38	784,000	784,000	100.00
Malaysia	37,187	37,025	100.44	39,047	38,883	100.42	40,998	40,826	100.42
Myanmar	477,680	480,980	99.31	607,099	610,399	99.46	729,919	729,919	100.00
Philippines	2,101,454	2,124,943	98.89	2,200,537	2,275,439	96.71	2,279,602	2,306,888	98.82
Singapore	–	99,900	0	–	99,900	0	–	99,900	0
Thailand	22,005,740	7,725,000	284.86	21,912,416	6,590,000	332.51	24,847,806	7,103,000	349.82
Vietnam	8,595,600	4,371,500	196.63	9,663,800	4,500,000	214.75	10,115,000	4,500,000	224.78

Table 66 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2010–2012

Unit: Tons

Country	2010			2011			2012		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	11,138,510	41,933,485	26.56	6,202,668	44,116,816	14.06	3,065,413	47,073,241	6.51
Brunei	n.a.	213	0	0	162	0.00	0	167	0.00
Cambodia	0	2,676,834	0.00	0	5,864,705	0.00	0	6,059,000	0.00
Indonesia	0	23,917,000	0.00	128,318	23,464,000	0.55	684,533	25,449,541	2.69
Lao PDR	n.a.	500,090	0	n.a.	673,328	0	n.a.	784,000	0
Malaysia	0	37,025	0.00	0	38,883	0.00	85	40,826	0.21
Myanmar	0	480,980	0.00	0	610,399	0.00	0	729,919	0.00
Philippines	0	2,124,943	0.00	0	2,275,439	0.00	0	2,306,888	0.00
Singapore	0	99,900	0.00	0	99,900	0.00	0	99,900	0.00
Thailand	11,138,260	7,725,000	144.18	6,000,000	6,590,000	91.05	2,306,395	7,103,000	32.47
Vietnam	250	4,371,500	0.01	74,350	4,500,000	1.65	74,400	4,500,000	1.65

Table 67 Quantity and Value of Cassava Export by Countries of Destination in 2011

Quantity: Tons Values: US$

Exporting Country	Country of Destination													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia									19,955	10,513,130			188	460,980
Lao PDR														
Malaysia														
Myanmar														
Philippines														
Singapore														
Thailand	360	205,031	304	300,262	463,048	208,113,264	4,317	1,510,469	208,117	100,939,043	537	323,709	53,694	28,706,302
Vietnam									19,245	8,297,281			24,033	9,496,446

Exporting Country	Country of Destination						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia	554	856,454	1	500	9,915	5,363,985	30,613	17,195,049	100,367	42,548,134	130,980	59,743,183
Lao PDR			63,000	5,678,171	17,667	924,382	80,667	6,602,553			80,667	6,602,553
Malaysia	87	30,827					87	30,827	8	14,580	95	45,407
Myanmar												
Philippines					0.23	409	0.23	409	1,100	1,559	1,100	1,968
Singapore												
Thailand	45,236	23,491,183			519	361,797	776,132	363,951,060	5,295,467	1,617,617,515	6,071,599	1,981,568,575
Vietnam							43,278	17,793,727	2,636,900	942,429,167	2,680,178	960,222,894

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 68 Quantity and Value of Cassava Import by Countries of Origin in 2011

Quantity: Tons Values: US$

Importing Country	Country of Origin													
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar		Philippines	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei														
Cambodia														
Indonesia											328	119,666		
Lao PDR														
Malaysia					3	2,616								
Myanmar														
Philippinest və					721	329,132			380	165,150				
Singapore														
Thailand			284,704	30,266,288	122	48,497	8,788	1,038,378	0.90	2,759				
Vietnam								1,000						

Importing Country	Country of Origin						Total within ASEAN		Total outside ASEAN		Total	
	Singapore		Thailand		Vietnam							
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia			139,395	73,843,139	1,720	789,582	141,443	74,752,387	128	93,148	141,571	74,845,535
Lao PDR			10,805	253,544			10,805	253,544	0	0	10,805	253,544
Malaysia							3	2,616	13	14,345	16	16,961
Myanmar												
Philippines			38,668	21,367,717	28,495	12,512,334	68,265	34,374,333	8,708	1,120,152	76,973	35,494,485
Singapore												
Thailand	0.33	518			24.55	34,625	293,639	31,391,065	163.37	287,558	293,802	31,678,623
Vietnam								1,000		109,325		110,325

Remark: The data in this table is obtained from national focal points of member states and may not complete.

Table 69 FOB Price of Cassava in selected ASEAN countries

Unit: US$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	Flour	2010	510	530	520	550	540	570	600	650	650	530	530	530	559
		2011	430	450	450	530	525	560	605	655	640	530	535	510	535
		2012	470	480	510	530	600								518
	Shredded	2010	204	212	246	250	165	NA	NA	176	176	178	NA	301	212
		2011	228	229	238	239	236	NA	NA	190	200	210	NA	295	229
		2012	215	235	240	245									234
Indonesia		2010	170	371	188	582	654	826	845	324	228	230	306	300	419
		2011	333	456	482	530	489	537	503	324	276	339	308	293	406
Philippines	Pellets	2010	1,320	1,150	1,170	1,440	1,410	1,320	1,290	1,500	1,130	1,240	1,600	1,370	1,328
		2011	1,412	1,452	1,315	1,500	1,485	1,552	1,513	1,198	1,371	1,463	1,536	1,218	1,418
		2012	1,411	1,695											1,553
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	573	580	531	493	471	442	430			518
	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	229	275	273	318	254	266	254			261
	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	276	276	266	265	264	251	251			261

Table 70 CIF Price of Cassava in selected ASEAN countries

Unit: US$/Ton

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia		2010	354	397	399	430	440	482	491	476	552	523	515	518	465
		2011	549	562	574	561	571	578	519	490	479	460	466	456	522
Philippines	Flour	2010	200	210	210	200			220	220		220			211
		2011	285	287									184		252

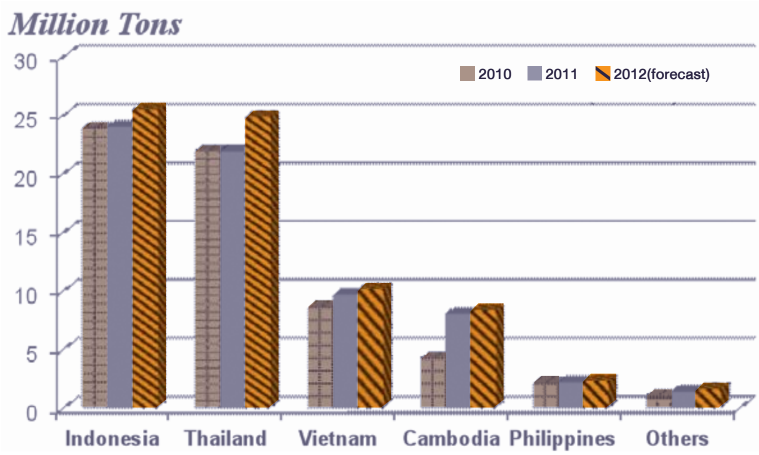


Figure 61 Cassava production of selected countries in ASEAN, 2010–2012

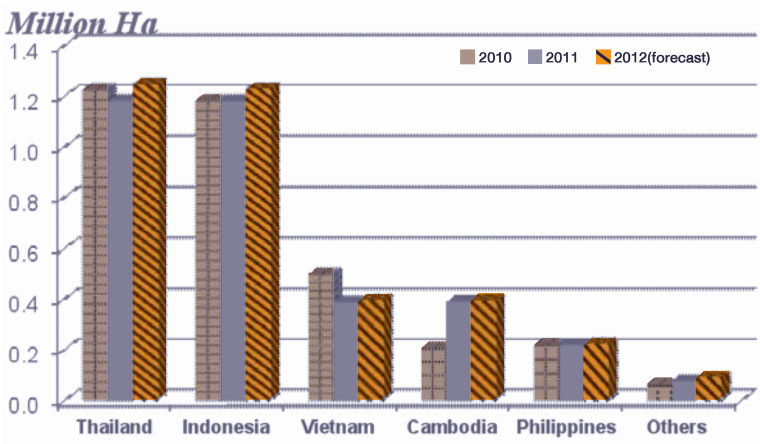


Figure 62 Cassava planted area of selected countries in ASEAN, 2010–2012

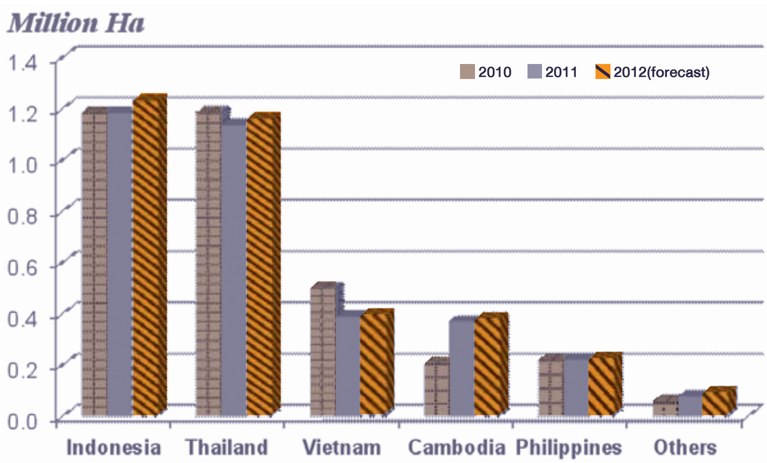


Figure 63 Cassava harvested area of selected countries in ASEAN, 2010–2012

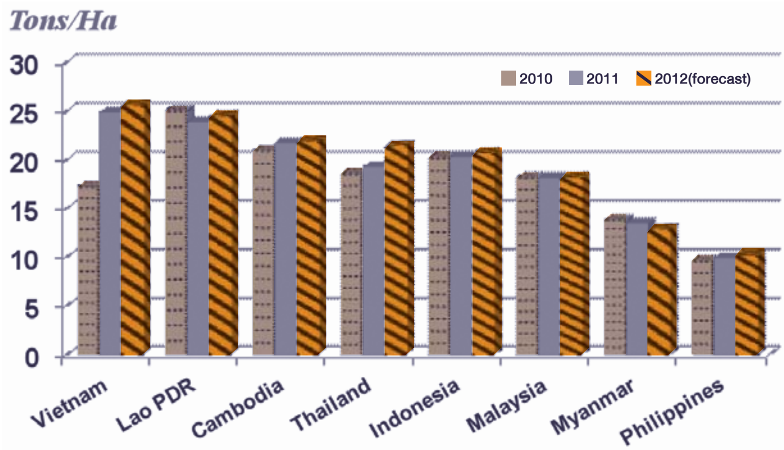


Figure 64 Cassava yield of countries in ASEAN, 2010–2012

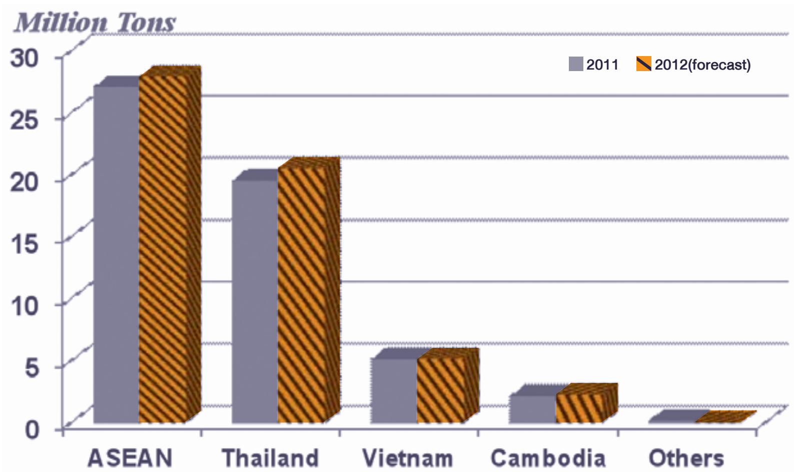


Figure 65 Amount of cassava export (million tons) of selected countries in ASEAN in 2011–2012

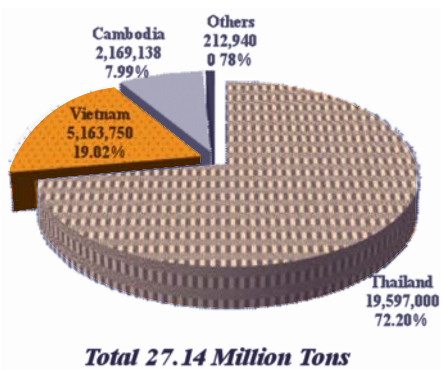


Figure 66 Share of cassava export (tons) among ASEAN countries, 2011

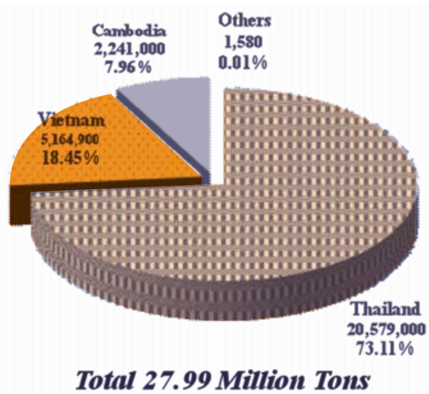


Figure 67 Share of cassava export (tons) among ASEAN countries, 2012

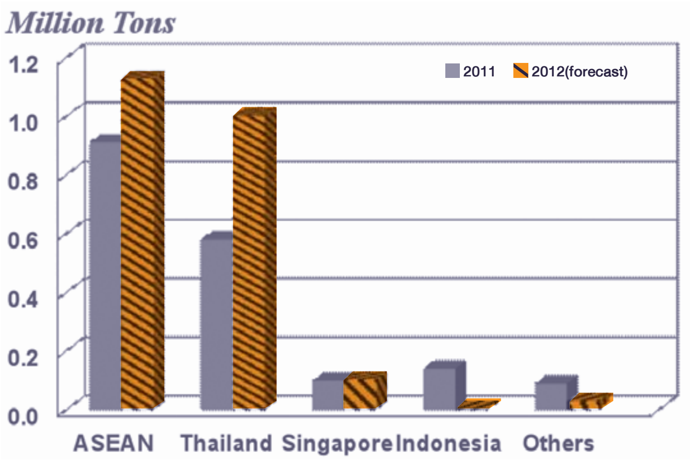


Figure 68 Amount of cassava import (million tons) by selected countries in ASEAN in 2011–2012

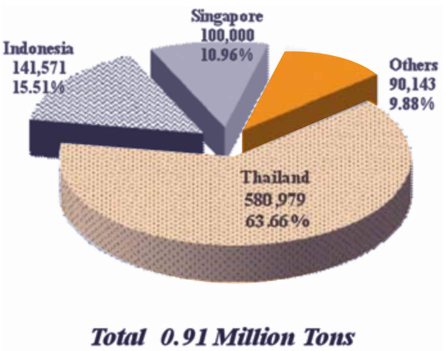


Figure 69 Share of cassava import (tons) among ASEAN countries, 2011

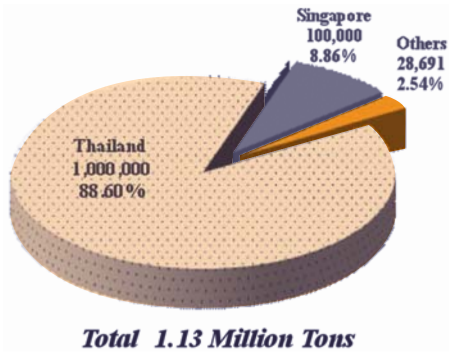


Figure 70 Share of cassava import (tons) among ASEAN countries, 2012

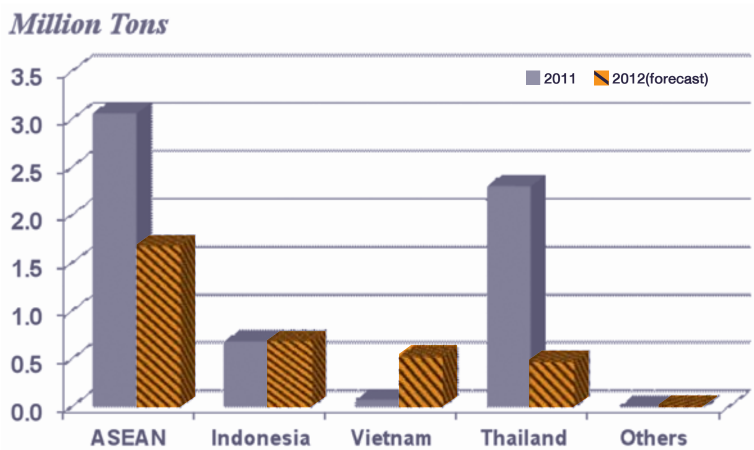


Figure 71 Amount of ending stock of cassava in ASEAN countries

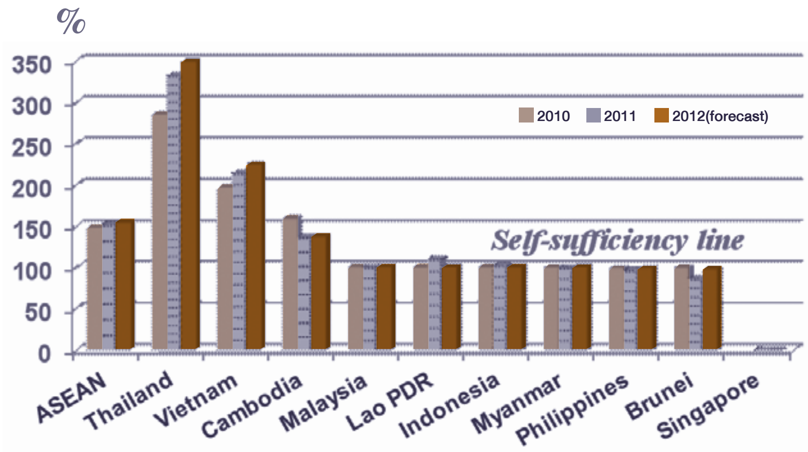


Figure 72 Ratio of cassava production to domestic utilization in ASEAN countries, 2011–2012

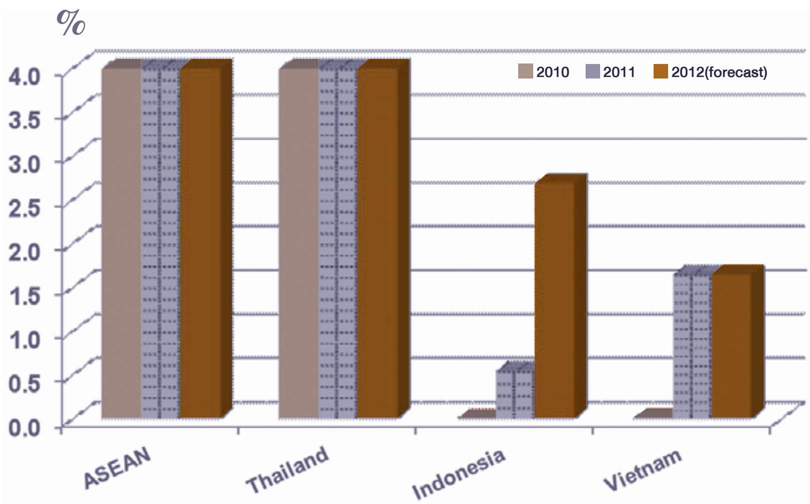


Figure 73 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2011–2012

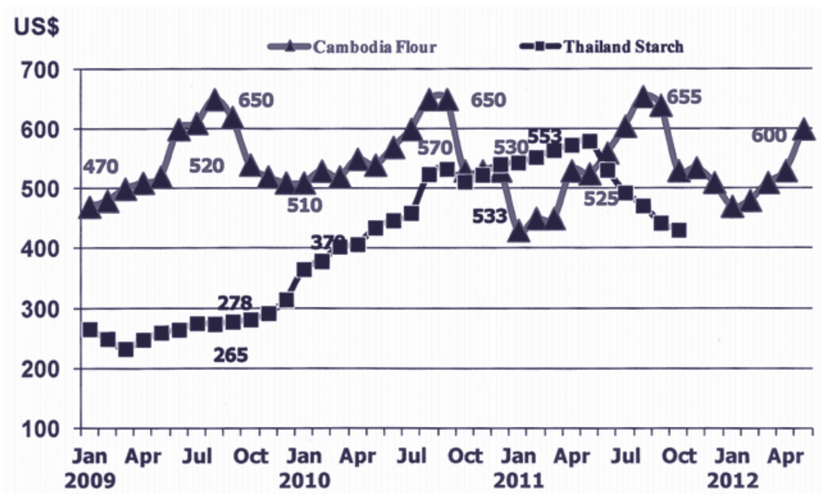


Figure 74 FOB price (US$) of cassava flour of selected countries in ASEAN in 2009–2012

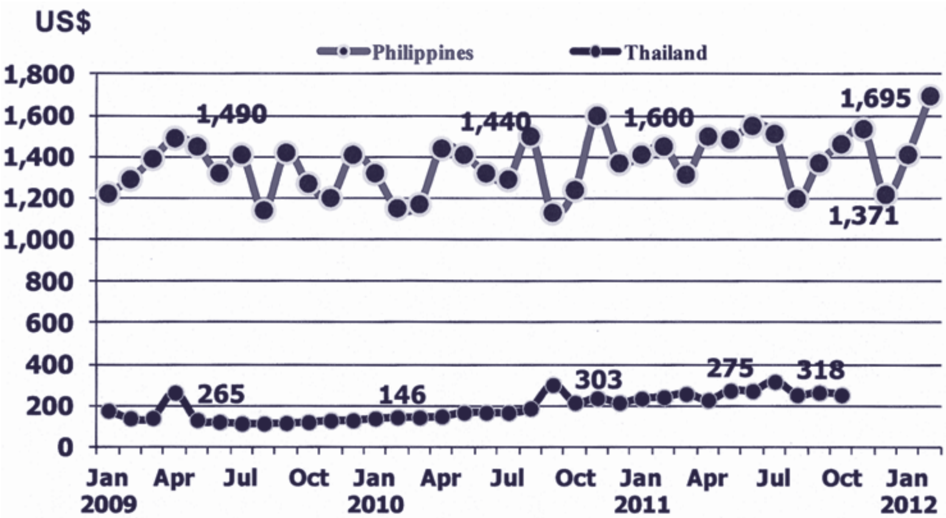


Figure 75 FOB price (US$) of cassava pellets of selected countries in ASEAN in 2009–2012

Explanatory notes

Production of Paddy for 2012

Brunei:

- Wet season refers to the crop harvested during August to October 2012.
- Dry season refers to the crop harvested during February to April 2012.

Cambodia:

- Wet season refers to the crop harvested during August to December 2011.
- Dry season refers to the crop harvested during January to March 2012.

Indonesia:

- Sumatera refers to the crop harvested during May to July 2012 and the crop harvested during November 2012 to January 2013.
- Jawa, Bali and West Nusa refer to the crop harvested during April to July 2012 and the crop harvested during October to December 2012.
- East Nusa refers to the crop harvested during June to September 2012.
- Kalimantan refers to the crop harvested during March to June 2012 and the crop harvested during August to November 2012.
- Sulawesi refers to the crop harvested during June to August 2012 and the crop harvested during November 2012 to January 2013.
- Maluku and Papua refer to the crop harvested during April to July 2012 and the crop harvested during August to November 2012.

Lao PDR:

- Wet season refers to the crop harvested during September 2011 to January 2012.
- Dry season refers to the crop harvested during February to May 2012.

Malaysia:

- Wet season refers to the crop harvested during December 2011 to June 2012.
- Dry season refers to the crop harvested during July to November 2012.

Myanmar:

- Wet season refers to the crop harvested during August 2011 to January 2012.
- Dry season refers to the crop harvested during February to August 2012.

Philippines:

- Wet season refers to the crop harvested during September to December 2012.
- Dry season refers to the crop harvested during February to May 2012.

Thailand:

Wet season

- North, Northeast and Center refer to the crop harvested during August 2011 to February 2012. The bulk of harvest occurred in November 2011 – December 2011.
- South refers to the crop harvested during November 2011 to April 2012. The bulk of harvest occurred in February 2012.

Dry season

- North, Northeast and Center refer to the crop harvested during February to August 2012.
- South refers to the crop harvested during March to October 2012.

Vietnam:

Spring-season

- North refers to the crop harvested during June to July 2012.
- South refers to the crop harvested during February to May 2012.

Autumn-season

- North refers to the crop harvested during August to September 2012.
- South refers to the crop harvested during July to September 2012.

Winter-season

- North refers to the crop harvested during October to November 2012.
- South refers to the crop harvested during October 2012 to January 2013.

Production of Maize for 2012

Cambodia:

- 1st crop harvested during February to March 2012.
- 2nd crop harvested during August to October 2012.

Indonesia:

- 1st crop harvested during January to April 2012.
- 2nd crop harvested during May to August 2012.
- 3rd crop harvested during September to December 2012.

Lao PDR:

- 1st crop harvested during June to July 2012.
- 2nd crop harvested during September to December 2012.

Myanmar:

- 1st crop harvested during January to March 2012.
- 2nd crop harvested during August to November 2012.

Philippines:

- 1st crop harvested during February to May 2012.
- 2nd crop harvested during July to November 2012.

Thailand:

- 1st crop harvested during February to July 2012.
- 2nd crop harvested during August 2012 to January 2013.

Vietnam:

- 1st crop harvested during January to March 2012.
- 2nd crop harvested during April to September 2012.
- 3rd crop harvested during July 2012 to January 2013.

Production of Sugarcane for 2012

Cambodia:

1st crop harvested during April to June 2012.

2nd crop harvested during October to December 2012.

Indonesia:

1st crop harvested during May to July 2012.

2nd crop harvested during September to November 2012.

Lao PDR:

The crop harvested during December 2011 to June 2012.

Myanmar:

The crop harvested during October 2011 to April 2012.

Philippines:

The crop harvested during October 2011 to June 2012.

Thailand:

The crop harvested during November 2011 to May 2012.

Vietnam:

The crop harvested during November 2011 to May 2012.

Production of Soybeans for 2012

Cambodia:

The crop harvested during half November to December 2012.

Indonesia:

1st crop harvested during January to April 2012.

2nd crop harvested during May to August 2012.

3rd crop harvested during September to December 2012.

Lao PDR:

1st crop harvested during January to February 2012.

2nd crop harvested during September to October 2012.

Myanmar:

1st crop harvested during September to December 2011.

2nd crop harvested during January to March 2012.

Philippines:

1st crop harvested during January to June 2012.

2nd crop harvested during July to December 2012.

Thailand:

1st crop harvested during February to May 2012.

2nd crop harvested during July to December 2012.

Vietnam:

1st crop harvested during February to May 2012.

2nd crop harvested during August to November 2012.

Production of Cassava for 2012

Cambodia:

The crop harvested during November to December 2012.

Indonesia:

1st crop harvested during January to April 2012.

2nd crop harvested during May to August 2012.

3rd crop harvested during September to December 2012.

Lao PDR:

The crop harvested during December 2011 to February 2012.

Myanmar:

The crop harvested during January to March 2012.

Philippines:

1st crop harvested during January to June 2012.

2nd crop harvested during July to December 2012.

Thailand:

The crop harvested during October 2011 to September 2012.

Vietnam:

North

The crop harvested during February to March 2013.

South

The crop harvested during September to October 2012.

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

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

nil : very small amount

Milling Rate of Rice (2012)

Unit: ton

Country	Paddy	Rice
ASEAN	1	0.62
Brunei	1	0.65
Cambodia	1	0.64
Indonesia	1	0.58
Lao PDR	1	0.60
Malaysia	1	0.64
Myanmar	1	0.63
Philippines	1	0.65
Thailand	1	0.66
Vietnam	1	0.62

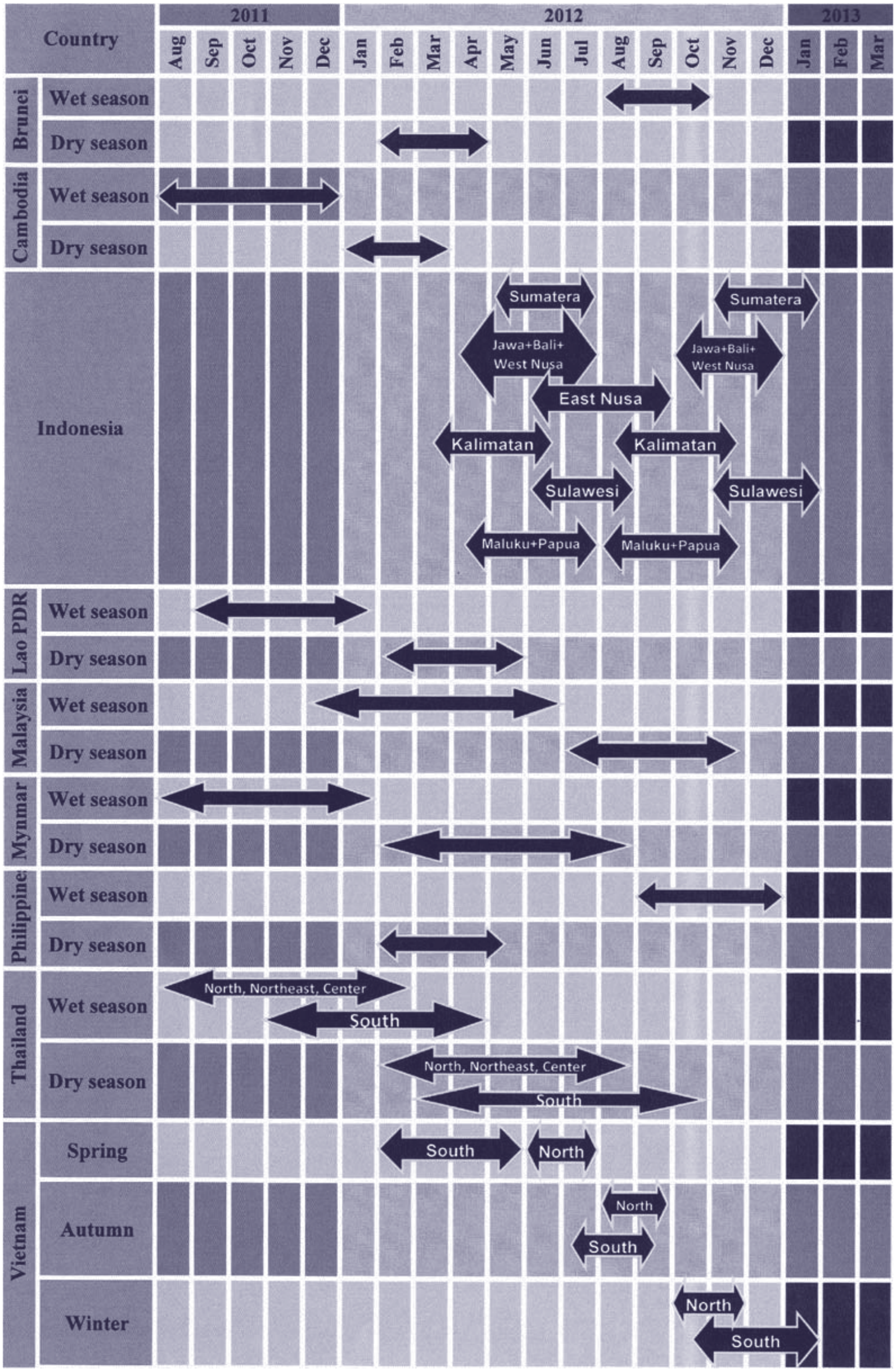
Extraction Rate of Sugar (2012)

Unit: tons

Country	Sugarcane	Sugar
ASEAN	1,000	154.71
Cambodia	1,000	100.00
Indonesia	1,000	153.85
Lao PDR	1,000	100.00
Myanmar	1,000	100.00
Philippines	1,000	91.50
Thailand	1,000	104.18
Vietnam	1,000	86.96

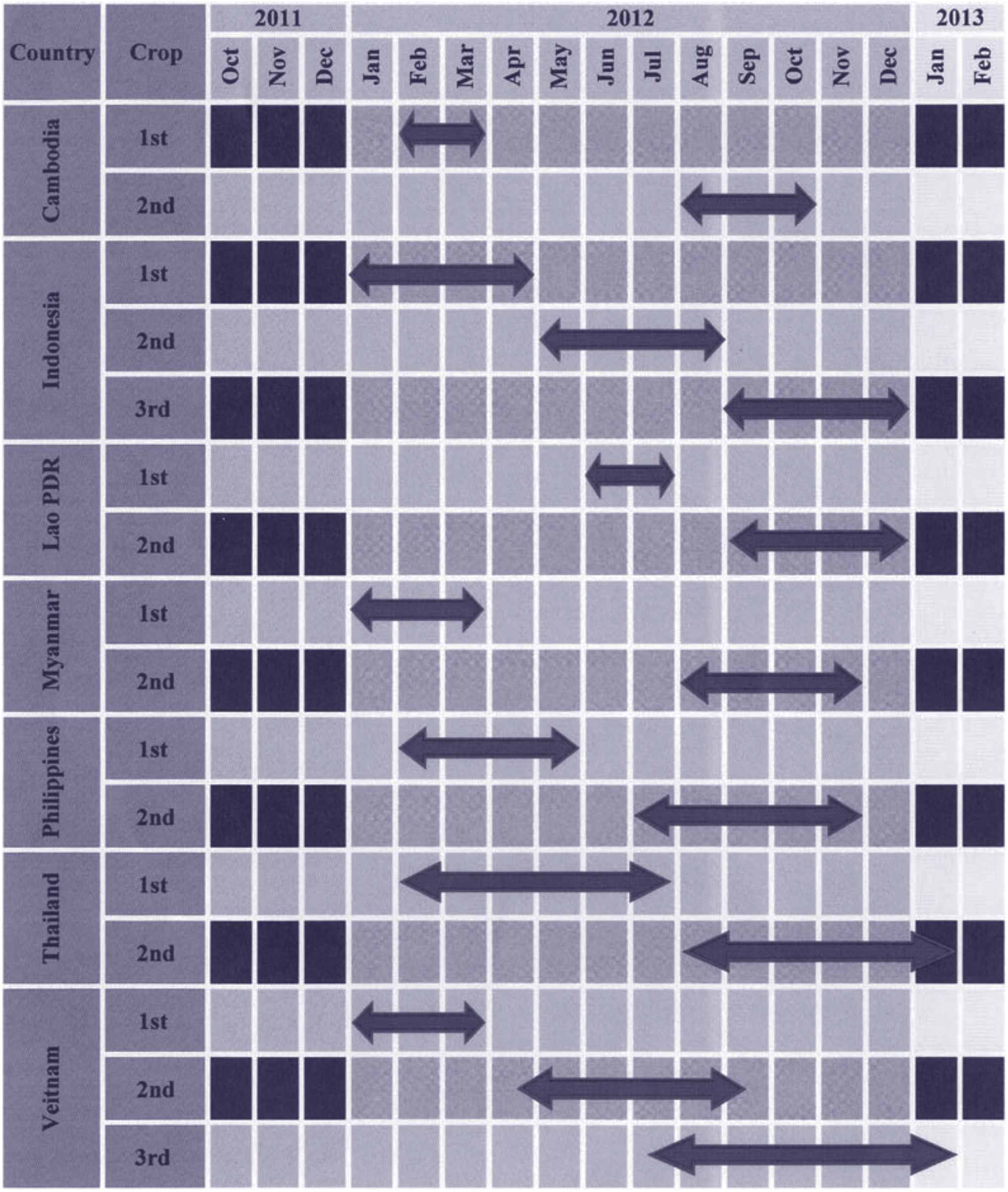
ANNEX 1

Rice crop calendar (harvested months) for crop year 2011/12 (2012) in ACO-8 report



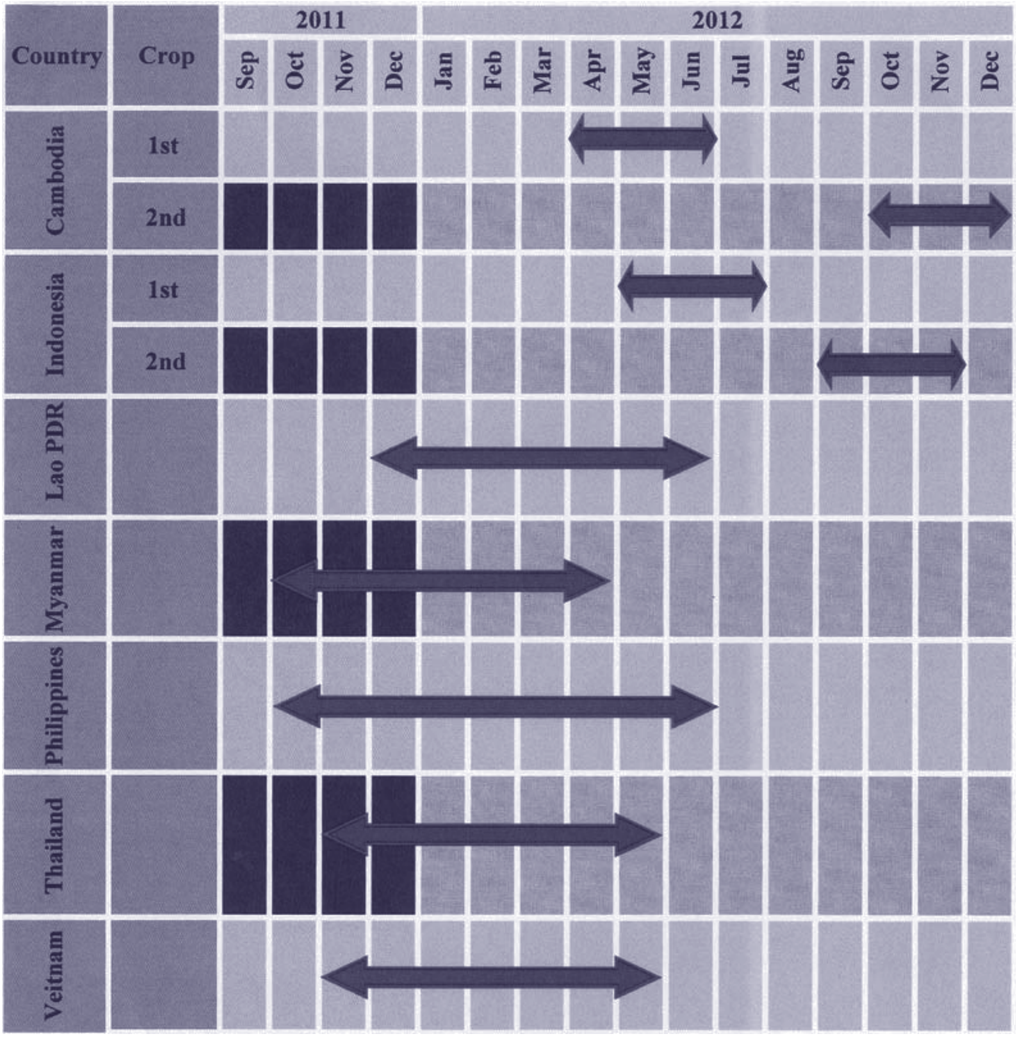
ANNEX 2

Maize crop calendar (harvested months) for crop year 2011/12 (2012) in ACO-8 report



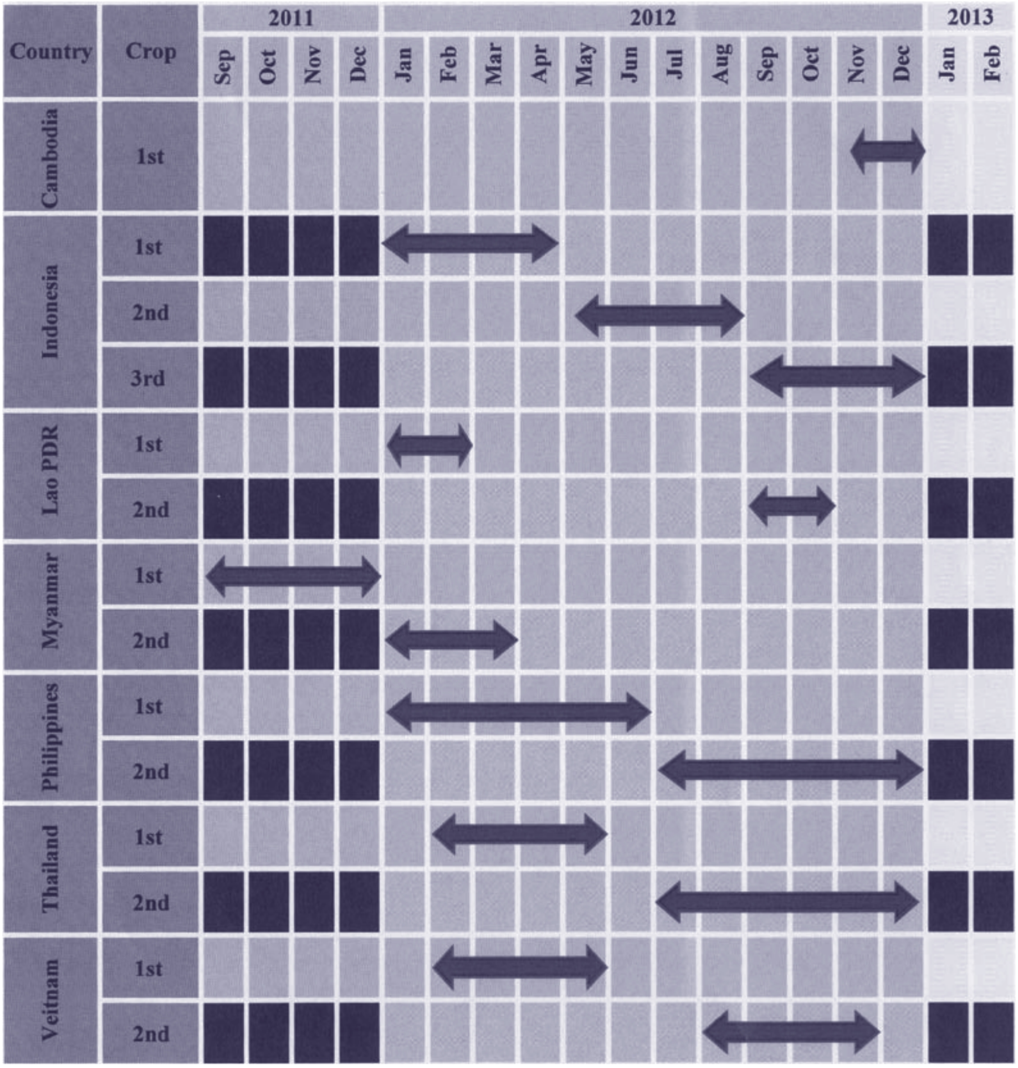
ANNEX 3

Sugarcane crop calendar (harvested months) for crop year 2011/12 (2012) in ACO-8 report



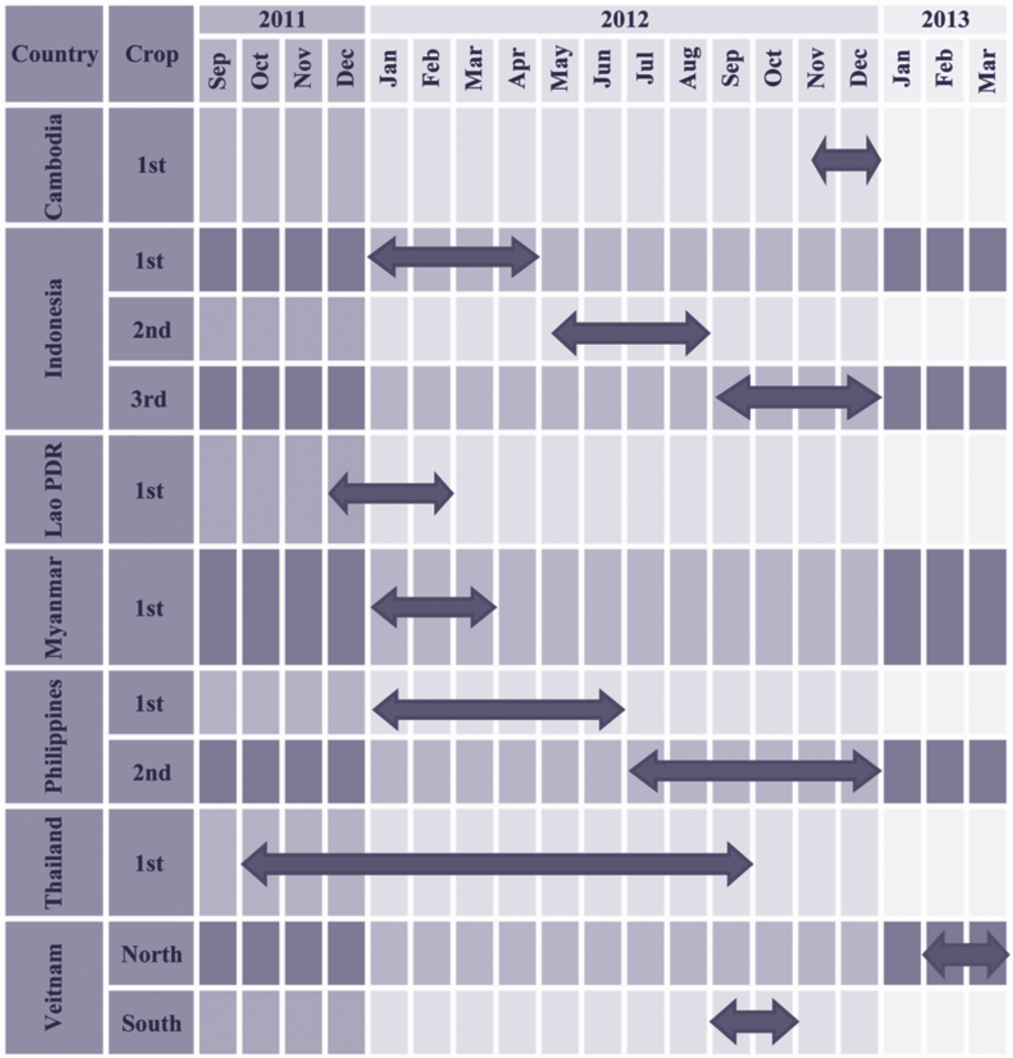
ANNEX 4

Soybean crop calendar (harvested months) for crop year 2011/12 (2012) in ACO-8 report



ANNEX 5

Cassava crop calendar (harvested months) for crop year 2011/12 (2012) in ACO-8 report



List of Delegates

The 8th Agricultural Commodity Outlook Committee Meeting
21 – 22 May 2012

Name	Position
1. **Mr. Montol Jeamchareon**	**AFSIS Project Manager** Ministry of Agriculture and Cooperatives Thailand
2. **Mr. Suriyan Vichitlekarn**	**Assistant Director and Head** Agriculture Industries & Natural Resources Division ASEAN Secretariat
3. **Mr. Tuor Vannak**	**Deputy Chief of Statistics Office** Department of Planning and Statistics Ministry of Agriculture Forestry and Fisheries Cambodia
4. **Mr. Muhammad Tassim Billah**	**Director of Center for Agricultural Data and Information Systems** Ministry of Agriculture Indonesia
5. **Ms. Somsanouk Khounthikoummane**	**Technical Staff** Center for Statistics and Information Department of Planning Ministry of Agriculture and Forestry Lao PDR
6. **Mr. Abd Rahman Bin Hussain**	**Deputy Undersecretary** Ministry of Agriculture and Agro-Based Industry Malaysia
7. **Mr. Romeo S. Recide**	**Assistant Secretary** Department of Agriculture Bureau of Agricultural Statistics
8. **Ms. Nareenat Roonnaphai**	**Deputy Secretary-General** Office of Agricultural Economics Ministry of Agriculture and Cooperatives Thailand

9. Ms. Unchana Tracho Director	**Centre for Agricultural Information** Office of Agricultural Economics Ministry of Agriculture and Cooperatives Thailand
10. Dr. Phan Sy Hieu	**Deputy header of The Statistics Division** The Informatics and Statistics Centre Ministry of Agriculture and Rural Development Vietnam
11. Mr. Ryuki IKEDA	**Deputy Director** Statistics Planning Division, Statistics Department Ministry of Agriculture, Forestry and Fisheries Japan
12. Mr. Shoji KIMURA	**Japanese Expert** Office of Agricultural Economics Ministry of Agriculture and Cooperatives Thailand
13. Mr. Yasushi Uchikawa	**Expert** ASEAN Plus Three Emergency Rice Reserve (APTERR) Office of Agricultural Economics Ministry of Agriculture and Cooperatives Thailand
14. Dr. Apichart Pongsrihadulchai	**AFSIS Consultant** Adviser to the Minister Chairman of the Meeting Ministry of Agriculture and Cooperatives Thailand

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