

Agricultural Commodity Outlook



No. 9 December 2012



ASEAN FOOD SECURITY INFORMATION SYSTEM (AFSIS) PROJECT

Report on ASEAN Agricultural Commodity Outlook

No. 9 December 2012

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



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 ninth 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 ACO Country Reports. The report was scrutinized by the ACO Committee comprises national experts nominated by ASEAN Countries before publication.

The AFSIS Secretariat would like to thank all Member States and delegates who participated in the ACO Committee Meeting during 18-19 December 2012 in Kanchanaburi, 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 AFSIS Secretariat would like to record its appreciation to the Ministry of Agriculture Forestry and Fisheries of Japan, ACO Committee, The ASEAN Secretariat and other concerned parties including Dr. Apichart Pongsrihadulchai, AFSIS Consultant on ACO report development, for their kind support to the implementation of the AFSIS Project and the development of this report.

AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agriculture and Cooperatives

Content



	Page
Highlights of Rice Outlook for 2013	1
ASEAN Rice Situation in 2012	2
Prospects for Rice in 2013	6
Highlights of Maize Outlook for 2013	22
ASEAN Maize Situation in 2012	23
Prospects for Maize in 2013	26
Highlights of Sugar Outlook for 2013	42
ASEAN Sugar Situation in 2012	43
Prospects for Sugar in 2013	46
Highlights of Soybean Outlook for 2013	61
ASEAN Soybean Situation in 2012	62
Prospects for Soybean in 2013	64
Highlights of Cassava Outlook for 2013	79
ASEAN Cassava Situation in 2012	80
Prospects for Cassava in 2013	82
Explanatory notes	97
Milling Rate of Rice (2013)	102
Extraction Rate of Sugar (2013)	102

ANNEX

1 Rice crop calendar (harvested months) for crop year 2012/13 (2013)	103
2 Maize crop calendar (harvested months) for crop year 2012/13 (2013)	104
3 Sugarcane crop calendar (harvested months) for crop year 2012/13 (2013)	105
4 Soybean crop calendar (harvested months) for crop year 2012/13 (2013)	106
5 Cassava crop calendar (harvested months) for crop year 2012/13 (2013)	107
6 List of Delegates of the 9th Agricultural Commodity Outlook Committee Meeting	108

List of Tables

Table	Page
1 Summary of the ASEAN rice situation, 2012-2013 (milled rice)	2
2 Paddy production in ASEAN countries, 2011-2013	7
3 Paddy planted area in ASEAN countries, 2011-2013	8
4 Paddy harvested area in ASEAN countries, 2011-2013	8
5 Paddy yield in ASEAN countries, 2011-2013	9
6 Paddy damaged area in ASEAN by cause of damage, 2012	9
7 Rice balance sheet of ASEAN countries, 2011 (milled rice)	10
8 Rice balance sheet of ASEAN countries, 2012 (milled rice)	10
9 Rice balance sheet of ASEAN countries, 2013 (milled rice)	11

List of Tables (Continued)

Table	Page
10 Ratio of rice production to domestic utilization in ASEAN countries, 2011-2013	12
11 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2011-2013	12
12 Quantity and Value of Rice Export by Countries of Destination in 2012	13
13 Quantities and Value of Rice Import by Countries of Origin in 2011	14
14 FOB Price of rice in selected ASEAN countries	15
15 CIF Price of rice in selected ASEAN countries	16
16 Summary of the ASEAN maize situation, 2012-2013	23
17 Maize production in ASEAN countries, 2011-2013	27
18 Maize planted area in ASEAN countries, 2011-2013	28
19 Maize harvested area in ASEAN countries, 2011-2013	28
20 Maize yield in ASEAN countries, 2011-2013	29
21 Maize damaged area in ASEAN by cause of damage, 2012	29
22 Maize balance sheet of ASEAN countries, 2011	30
23 Maize balance sheet of ASEAN countries, 2012	30
24 Maize balance sheet of ASEAN countries, 2013	31
25 Ratio of maize production to domestic utilization in ASEAN countries, 2011-2013	32
26 Ratio of maize beginning stock to domestic utilization in ASEAN Countries, 2011-2013	32
27 Quantity and Value of Maize Export by Countries of Destination in 2012	33
28 Quantities and Value of Maize Import by Countries of Origin in 2012	34
29 FOB Price of maize (Feed grain) in selected ASEAN countries	35

List of Tables (Continued)

Table	Page
30 CIF Price of maize (Feed grain) in selected ASEAN countries	36
31 Summary of the ASEAN sugar situation, 2012-2013	43
32 Sugarcane production in ASEAN countries, 2011-2013	47
33 Sugarcane planted area in ASEAN countries, 2011-2013	48
34 Sugarcane harvested area in ASEAN countries, 2011-2013	48
35 Sugarcane yield in ASEAN countries, 2011-2013	49
36 Sugarcane damaged area in ASEAN by cause of damage, 2012	49
37 Sugar balance sheet of ASEAN countries, 2011	50
38 Sugar balance sheet of ASEAN countries, 2012	50
39 Sugar balance sheet of ASEAN countries, 2013	51
40 Ratio of sugar production to domestic utilization in ASEAN countries, 2011-2013	52
41 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2011-2013	52
42 Quantity and Value of Sugar Export by Countries of Destination in 2012	53
43 Quantities and Value of Sugar Import by Countries of Origin in 2012	54
44 FOB Price of sugar in selected ASEAN countries	55
45 CIF Price of sugar in selected ASEAN countries	55
46 Summary of the ASEAN soybean situation, 2012-2013	62
47 Soybean production in ASEAN countries, 2011-2013	65
48 Soybean planted area in ASEAN countries, 2011-2013	66
49 Soybean harvested area in ASEAN countries, 2011-2013	66
50 Soybean yield in ASEAN countries, 2011-2013	67
51 Soybean damaged area in ASEAN by cause of damage, 2012	67
52 Soybean balance sheet of ASEAN countries, 2011	68

List of Tables (Continued)

Table	Page
53 Soybean balance sheet of ASEAN countries, 2012	68
54 Soybean balance sheet of ASEAN countries, 2013	69
55 Ratio of soybean production to domestic utilization in ASEAN countries, 2011-2013	70
56 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2011-2013	70
57 Quantity and Value of Soybean Export by Countries of Destination in 2012	71
58 Quantities and Value of Soybean Import by Countries of Origin in 2012	72
59 FOB Price of soybean in selected ASEAN countries	73
60 CIF Price of soybean in selected ASEAN countries	73
61 Summary of the ASEAN cassava situation, 2012-2013	79
62 Cassava production in ASEAN countries, 2011-2013	83
63 Cassava planted area in ASEAN countries, 2011-2013	84
64 Cassava harvested area in ASEAN countries, 2011-2013	84
65 Cassava yield in ASEAN countries, 2011-2013	85
66 Cassava damaged area in ASEAN by cause of damage, 2012	85
67 Cassava balance sheet of ASEAN countries, 2011 (Cassava roots fresh)	86
68 Cassava balance sheet of ASEAN countries, 2012 (Cassava roots fresh)	86
69 Cassava balance sheet of ASEAN countries, 2013 (Cassava roots fresh)	87
70 Ratio of cassava production to domestic utilization in ASEAN countries, 2011-2013	88
71 Ratio of cassava beginning stock to domestic utilization in ASEAN Countries, 2011-2013	88

List of Tables (Continued)

Table	Page
72 Quantity and Value of Cassava Export by Countries of Destination in 2012	89
73 Quantities and Value of Cassava Import by Countries of Origin in 2012	90
74 FOB Price of Cassava in selected ASEAN countries	91
75 CIF Price of Cassava in selected ASEAN countries	91

List of Figures

Figure	Page
1 Paddy production of selected countries in ASEAN, 2011-2013	17
2 Paddy planted area of selected countries in ASEAN, 2011-2013	17
3 Paddy harvested area of selected countries in ASEAN, 2011-2013	17
4 Paddy yield of countries in ASEAN, 2011-2013	18
5 Amount of rice export (million tons) of selected countries in ASEAN in 2012-2013	18
6 Share of rice export (tons) among ASEAN countries, 2012	18
7 Share of rice export (tons) among ASEAN countries, 2013	18
8 Amount of rice import (million tons) by selected countries in ASEAN in 2012-2013	19
9 Share of rice import (tons) among ASEAN countries, 2012	19
10 Share of rice import (tons) among ASEAN countries, 2013	19
11 Amount of ending stock of rice in ASEAN countries in 2012-2013	19

List of Figures (Continued)

Figure	Page
12 Ratio of rice production to domestic utilization in ASEAN countries, 2011-2013	20
13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2011-2013	20
14 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2010-2012	20
15 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2010-2012	21
16 CIF price (US\$/Ton) of milled rice of selected countries in ASEAN in 2010-2012	21
17 Maize production of selected countries in ASEAN, 2011-2013	37
18 Maize planted area of selected countries in ASEAN, 2011-2013	37
19 Maize harvested area of selected countries in ASEAN, 2011-2013	37
20 Maize yield of countries in ASEAN, 2011-2013	38
21 Amount of maize export (million tons) of selected countries in ASEAN in 2012-2013	38
22 Share of maize export (tons) among ASEAN countries, 2012	38
23 Share of maize export (tons) among ASEAN countries, 2013	38
24 Amount of maize import (million tons) by selected countries in ASEAN in 2012-2013	39
25 Share of maize import (tons) among ASEAN countries, 2012	39
26 Share of maize import (tons) among ASEAN countries, 2013	39

List of Figures (Continued)

Figure	Page
27 Amount of ending stock of maize in ASEAN countries in 2012-2013	39
28 Ratio of maize production to domestic utilization in ASEAN countries, 2011-2013	40
29 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2011-2013	40
30 FOB price (US\$/Ton) of maize of selected countries in ASEAN in 2010-2012	41
31 CIF price (US\$/Ton) of maize of selected countries in ASEAN in 2010-2012	41
32 Sugarcane production of selected countries in ASEAN, 2011-2013	56
33 Sugarcane planted area of selected countries in ASEAN, 2011-2013	56
34 Sugarcane harvested area of selected countries in ASEAN, 2011-2013	56
35 Sugarcane yield of countries in ASEAN, 2011-2013	57
36 Amount of sugar export (million tons) of selected countries in ASEAN in 2012-2013	57
37 Share of sugar export (tons) among ASEAN countries, 2012	57
38 Share of sugar export (tons) among ASEAN countries, 2013	57
39 Amount of sugar import (million tons) by selected countries in ASEAN in 2012-2013	58
40 Share of sugar import (tons) among ASEAN countries, 2012	58
41 Share of sugar import (tons) among ASEAN countries, 2013	58

List of Figures (Continued)

Figure	Page
42 Amount of ending stock of sugar in ASEAN countries in 2012-2013	58
43 Ratio of sugar production to domestic utilization in ASEAN countries, 2011-2013	59
44 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2011-2013	59
45 FOB price (US\$/Ton) of white sugar of selected countries in ASEAN in 2010-2012	60
46 CIF price (US\$/Ton) of white sugar of selected countries in ASEAN in 2010-2012	60
47 Soybean production of selected countries in ASEAN, 2011-2013	74
48 Soybean planted area of selected countries in ASEAN, 2011-2013	74
49 Soybean harvested area of selected countries in ASEAN, 2011-2013	74
50 Soybean yield of countries in ASEAN, 2011-2013	75
51 Amount of soybean export (million tons) of selected countries in ASEAN in 2012-2013	75
52 Share of soybean export (tons) among ASEAN countries, 2012	75
53 Share of soybean export (tons) among ASEAN countries, 2013	75
54 Amount of soybean import (million tons) by selected countries in ASEAN in 2012-2013	76
55 Share of soybean import (tons) among ASEAN countries, 2012	76
56 Share of soybean import (tons) among ASEAN countries, 2013	76

List of Figures (Continued)

Figure	Page
57 Amount of ending stock of soybean in ASEAN countries in 2012-2013	76
58 Ratio of soybean production to domestic utilization in ASEAN countries, 2011-2013	77
59 Ratio of soybean beginning stock to domestic utilization in ASEAN Countries, 2011-2013	77
60 FOB price (US\$/Ton) of soybean of selected countries in ASEAN in 209-2012	78
61 CIF price (US\$/Ton) of soybean of selected countries in ASEAN in 2010-2012	78
62 Cassava production of selected countries in ASEAN, 2011-2013	92
63 Cassava planted area of selected countries in ASEAN, 2011-2013	92
64 Cassava harvested area of selected countries in ASEAN, 2011-2013	92
65 Cassava yield of countries in ASEAN, 2011-2013	93
66 Amount of cassava export (million tons) of selected countries In ASEAN in 2012-2013	93
67 Share of cassava export (tons) among ASEAN countries, 2012	93
68 Share of cassava export (tons) among ASEAN countries, 2013	93
69 Amount of cassava import (million tons) by selected countries in ASEAN in 2012-2013	94
70 Share of cassava import (tons) among ASEAN countries, 2012	94
71 Share of cassava import (tons) among ASEAN countries, 2013	94

List of Figures (Continued)

Figure	Page
72 Amount of ending stock of cassava in ASEAN countries in 2012-2013	94
73 Ratio of cassava production to domestic utilization in ASEAN countries, 2011-2013	95
74 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2011-2013	95
75 FOB price (US\$/Ton) of cassava flour of selected countries In ASEAN in 2010-2012	96
76 FOB price (US\$/Ton) of cassava pellets of selected countries in ASEAN in 2010-2012	96



Highlights of Rice Outlook for 2013

- Rice (milled rice) supply in ASEAN is forecast to slightly increase about 4.06 million tons which is about 3 percent from 157.85 million tons in 2012 to 161.91 million tons in 2013 (Table 1).
- The production is forecast to slightly decrease from 131.71 million tons to 131.51 million tons.
- The rice export from the ASEAN is forecast to increase from 17.66 million tons in 2012 to 18.28 million tons in 2013, an increase of 0.62 million tons or 3.5 percent (Table 2).
- The rice import by the ASEAN in 2013 is projected to be 3.25 million tons, an increase of 0.33 million tons or about 11 percent from 2.93 million tons in 2012.
- The beginning stock of the ASEAN in 2013 is estimated at 27.15 million tons, an increase from 23.21 million tons in 2012.
- The production to domestic utilization ratio (self-sufficiency ratio) for the region is estimated to be 115 percent in 2013, a slightly improve from 117 percent in 2012 indicated that, aggregately, the ASEAN is still produced rice enough for regional consumption.
- The beginning stock to domestic utilization ratio (food security ratio) is estimated to be about 24 percent in 2013 which increased from 21 percent in 2012

**Table 1 Summary of the ASEAN rice situation, 2012-2013
(milled rice)**

Unit: Million tons

Items	2012	2013	Change	
			Quantity	%
Supply (Million tons)	157.85	161.91	4.06	2.57
Beginning stock	23.21	27.15	3.94	16.97
Production	131.71	131.51	-0.20	-0.16
Import	2.93	3.25	0.33	11.14
Demand (Million tons)	157.85	161.91	4.06	2.57
Domestic utilization	113.04	114.57	1.53	1.35
Export	17.66	18.28	0.62	3.51
Ending stock	27.15	29.06	1.92	7.05
Ratio of production to domestic utilization (%)	116.51	114.78	-1.73	-
Ratio of beginning stock to domestic utilization (%)	20.53	23.70	3.17	-

ASEAN Rice Situation in 2012

Production

Paddy production in ASEAN in 2012 (crop year 2011/12) was estimated at 212.57 million tons, an increase of 5.77 million tons which is about 3 percent from 206.80 million tons in 2012. This estimate has been revised upward from 208.20 million tons in September 2012 Early Warning Information (EWI) report. Myanmar is the only country that the estimated production has decreased. For the rest of the countries in the region, the production estimates have increased. The increase contributed to both the area expansion and the increase in yield (Table 2-5, Figure 1-4).

In **Brunei**, the increase in production attributed to both the increase in area and yield. The increase in area was due to the favorable weather and the government policy to promote rice crop while the increase in yield was due to the increase in using new improved (hybrid) variety, more fertilizer application and the favorable weather.

In **Cambodia**, the increase in production derived from the area expansion and the increase in yield. The farmer's response to the increase in price and the favorable weather were the factors cited for the area expansion. The increase in yield contributed to the increasing in using improved varieties and applied more fertilizer as well as the favorable weather.

For **Indonesia**, the increase in production came from the increase in planted area and yield. The area expansion attributed to the government policy and the favorable weather while the increase in yield attributed to the increase in using improved variety and farmers applied more fertilize in response to the price increase.

For **Lao PDR**, the increase in production was the result of the increase in the area planted and yield. The increase in the area was very eminent in the second crop in response to the price increase as well as government policy. The increase in yield was due to favorable weather and the increase in using improved variety.

In **Malaysia**, the increase in planted area of the first crop due to the incentive provided by the government and sufficient water supply was able to compensate the reduction in the area of the second crop due to the unfavorable weather. Thus, the total planted area has increased. The increase in yield attributed to the new technology adopted by the farmers, improvement of irrigation and drainage system as well as the ability of the government in controlling and preventing the spread of disease.

In **Myanmar**, the reduction of the planted area was due to the change in land use to update cadastral maps while the reduction in yield was due to the effect of heavy rain in some producing area.

For **the Philippines**, the expansion of the planted area was because of the early planting due to the pronouncement of El Niño. The increase in yield was because of the farmers using more of improved varieties.

For **Thailand**, even though the planted area has increased due to the rice mortgage scheme of the government, the harvested area has decreased due to the flood. The increase in yield was due to the favorable weather in some area.

In **Vietnam**, the increase in area was due to the favorable weather and the farmers' response to the price increase. The increase in yield attributed to the farmers using more of improved variety and taking care their crop better in response to the price increase.

Utilization and Stock

The domestic utilization of rice (milled rice) within ASEAN in 2012 (calendar year) was estimated at 113.04 million tons an increase of about 1.38 million tons or about one percent from the previous year (Table 7-8).

The ratio of production to domestic utilization within the ASEAN in 2012 is estimated at 117 percent indicated that, aggregately, the ASEAN is a rice self-sufficient region. However, on the country by countries basis, some countries in the region is still need to import rice for their own consumption. The highest ratio was found in Thailand, Cambodia and Vietnam respectively while the lowest ratio was in Brunei (Table 10, Figure 12).

The beginning stock in 2012 (January 2012) of The ASEAN was estimated at 23.21 million tons up 0.57 million tons from 22.64 million tons in 2012. Thailand carried about 9.07 million tons or about 39 percent of the ASEAN stock and followed by Vietnam, Indonesia, Myanmar and the Philippines which carried about 3 million tons each. These four countries carried stock all together about 12.16 million tons or about 52 percent of the total stock in the ASEAN.

The ratio of the beginning stock to the domestic utilization in 2012 for the whole ASEAN was estimated at about 21 percent which is the optimum value. However, there are some countries that have the ratio below 20 percent which included Indonesia, Myanmar, Singapore, Vietnam and Lao PDR (Table 11, Figure 13).

Trade

In 2012, the ASEAN exported about 17.66 million tons down 2.90 million tons or 14 percent from 20.56 million tons exported in 2011. Even though Vietnam was able to increase its export from 7.11 million tons to 8.10 million tons but was not able to offset the reduction in export from Thailand which exported 10.71 million tons in 2011 and reduced to 6.50 million tons in 2012 due to the higher FOB price than other exporting countries.

The import by the ASEAN in 2012 was estimated at 2.93 million tons, down 1.71 million tons or 37 percent from 4.64 million tons in 2011. In 2012, Indonesia was the biggest importer and followed by Malaysia and the Philippines respectively (Table 7-8, Figure 8-9).

The quantity and value of rice export from ASEAN countries by countries of destination and the quantity and value of import by countries of origin are given in table 12-13.

Prices

Monthly FOB prices of rice export and CIF prices for rice import in selected countries in ASEAN during 2010-2012 are shown in Table 14-15.

For FOB prices of 5% milled rice in 2012, Cambodia average price was 634 US\$/ton, Thailand average price was 575 US\$/ton and Vietnam average price was 465 US\$/ton. For Cambodia and Thailand the average price of 2012 was higher than the 2011 average. For Vietnam, however, the average price in 2012 was lower than 2011 average.

For CIF prices, the average price of 5% milled rice in the Philippines were 521 and 464 US\$/ton in 2011 and 2012 respectively. The average CIF prices for fragrant rice in Malaysia in 2011 and 2012 were 557 US\$/ton and 656 US\$/ton respectively. For Singapore and Indonesia, the grade of rice import was not specified.

Damaged Area

The damaged area of rice in the ASEAN in 2012 (crop year 2011/12) was reported to be about 1.72 million hectares of which 1.57 hectares or 91 percent caused by the flood. The damage has occurred the most in Thailand and mainly due to the flood. The drought was the second in terms of the damaged area and has also occurred the most in Thailand (Table 6).

Prospects for Rice in 2013

Production

Paddy production in ASEAN in 2013 (crop year 2012/13) is forecast to be about 212.45 million tons, a slightly decrease from 212.57 million tons in 2012. The most reduction is expected in Thailand due to the reduction in planted area as a result of unfavorable weather. Malaysia is another country that the production in 2013 will be reduced due to the reduction in planted area because of the unfavorable weather and the reduction in the yield due to the flood (Table 2-5, Figure 1-4).

Utilization and Stock

The domestic utilization in 2013 is projected to be 114.57 million tons, an increase 1.53 million tons or about one percent compared to 113.04 million tons in 2012 (Table 8-9).

The beginning stock in 2013 is estimated at 27.15 million tons, up 3.94 million tons or about 17 percent from 23.21 million tons in 2012. The ending stock in 2013 is forecast to be 29.06 million tons, an increase of 1.92 million tons or about 7 percent from 27.15 million tons in 2012 (Table 8-9, Figure 11).

The ratio of production to domestic utilization is forecast to decrease from 117 percent in 2012 to 115 percent in 2013, indicated that the ASEAN is still produced enough for consumption within the region (Table 10, Figure 12).

The ratio of the beginning stock to the domestic utilization in 2013 is forecast to be about 24 percent which increased from 21 percent in 2012 (Table 11, Figure 13).

Trade

Rice export from ASEAN is forecast to increase slightly from 17.66 million tons in 2012 to 18.28 million tons in 2013 (Table 8-9, Figure 5 and 7). Cambodia and Myanmar is expected to export about the same amount as in 2012. For Thailand, the export in 2013 is forecast to increase from the record low in 2012 due to the high price because it carried very high stock. Vietnam is forecast to export less than the record high in the previous year due to the low stock.

For the import, the whole ASEAN is forecast to import about 3.25 million tons in 2013, an increase about 0.33 million tons or about 11 percent as compared to 2012 (Table 8-9, Figure 8 and 10).

Table 2 Paddy production in ASEAN countries, 2011-2013

Unit: 1,000 Tons

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	206,801.17	212,573.72	5,772.55	2.79	212,447.06	-126.66	-0.06
Brunei	2.28	2.59	0.32	13.84	2.92	0.33	12.81
Cambodia	8,249.45	8,779.37	529.92	6.42	9,305.52	526.15	5.99
Indonesia	65,756.90	68,956.29	3,199.39	4.87	69,844.51	888.22	1.29
Lao PDR	3,065.76	3,722.70	656.94	21.43	3,823.69	100.99	2.71
Malaysia	2,575.99	2,750.41	174.42	6.77	2,626.88	-123.52	-4.49
Myanmar	32,064.43	29,009.91	-3,054.52	-9.53	29,264.07	254.16	0.88
Philippines	16,684.06	17,975.53	1,291.47	7.74	18,066.96	91.42	0.51
Singapore	-	-	-	-	-	-	-
Thailand	36,003.80	37,976.53	1,972.73	5.48	36,175.01	-1,801.52	-4.74
Vietnam	42,398.50	43,400.40	1,001.90	2.36	43,337.50	-62.90	-0.14

Table 3 Paddy planted area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2012		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	50,879.39	51,531.40	652.01	1.28	51,189.60	-341.81	-0.66
Brunei	1.76	1.85	0.08	4.59	2.13	0.29	15.61
Cambodia	2,795.89	3,033.98	238.09	8.52	2,998.11	-35.87	-1.18
Indonesia	13,241.97	13,495.01	253.04	1.91	13,969.28	474.27	3.51
Lao PDR	914.54	945.00	30.46	3.33	950.00	5.00	0.53
Malaysia	687.52	692.34	4.82	0.70	688.21	-4.13	-0.60
Myanmar	8,047.28	7,592.76	-454.52	-5.65	7,488.48	-104.28	-1.37
Philippines	4,626.81	4,702.77	75.96	1.64	4,698.55	-4.22	-0.09
Singapore	-	-	-	-	-	-	-
Thailand	12,908.22	13,321.80	413.58	3.20	12,621.85	-699.96	-5.25
Vietnam	7,655.40	7,745.90	90.50	1.18	7,773.00	27.10	0.35

Table 4 Paddy harvested area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2012		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	49,806.09	49,807.01	0.91	0.00	50,099.00	291.99	0.59
Brunei	1.60	1.68	0.07	4.55	1.92	0.24	14.43
Cambodia	2,777.32	2,766.61	-10.71	-0.39	2,970.70	204.08	7.38
Indonesia	13,203.64	13,471.65	268.01	2.03	13,868.21	396.56	2.94
Lao PDR	817.25	945.00	127.75	15.63	950.00	5.00	0.53
Malaysia	683.23	682.35	-0.89	-0.13	673.72	-8.63	-1.27
Myanmar	8,011.48	7,566.94	-444.54	-5.55	7,464.41	-102.53	-1.35
Philippines	4,536.64	4,691.77	155.13	3.42	4,698.55	6.78	0.14
Singapore	-	-	-	-	-	-	-
Thailand	12,119.52	11,935.11	-184.42	-1.52	11,698.50	-236.61	-1.98
Vietnam	7,655.40	7,745.90	90.50	1.18	7,773.00	27.10	0.35

Table 5 Paddy yield in ASEAN countries, 2011-2013

Unit: Ton/Hectare

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	4.15	4.27	0.12	2.89	4.24	-0.03	-0.70
Brunei	1.42	1.55	0.13	9.15	1.52	-0.03	-1.94
Cambodia	2.97	3.17	0.20	6.73	3.13	-0.04	-1.26
Indonesia	4.98	5.12	0.14	2.81	5.04	-0.08	-1.56
Lao PDR	3.75	3.94	0.19	5.07	4.02	0.08	2.03
Malaysia	3.77	4.03	0.26	6.90	3.90	-0.13	-3.23
Myanmar	4.00	3.83	-0.17	-4.25	3.92	0.09	2.35
Philippines	3.68	3.83	0.15	4.08	3.85	0.02	0.52
Singapore	-	-	-	-	-	-	-
Thailand	2.97	3.18	0.21	7.07	3.09	-0.09	-2.83
Vietnam	5.54	5.60	0.06	1.08	5.58	-0.02	-0.36

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

Table 6 Paddy damaged area in ASEAN by cause of damage, 2012

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	1,568,317	98,079	12,136	29,788	15,059	2	1,723,381
Brunei	21	25	50	62	-	2	160
Cambodia	267,311	53	-	-	-	-	267,364
Indonesia	-	-	-	23,353	-	-	23,353
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	3,619	6,373	-	-	9,992
Myanmar	16,478	2,010	156	-	7,179	-	25,823
Philippines	3,114	-	-	-	7,880	-	10,994
Singapore	-	-	-	-	-	-	-
Thailand	1,281,393	95,991	8,311	-	-	-	1,385,695
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Note: For Indonesia cause of damage is total of flood, drought, pests 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	22,639,455	128,152,462	4,642,251	155,434,168	111,664,371	20,559,452	23,210,346	155,434,168
Brunei	15,885	1,480	27,385	44,750	33,315	-	11,436	44,750
Cambodia	516,633	5,279,649	-	5,796,282	3,035,913	1,847,877	912,492	5,796,282
Indonesia	1,637,082	38,417,477	2,744,261	42,798,820	39,725,193	1,065	3,072,562	42,798,820
Lao PDR	259,919	1,936,458	58,481	2,254,858	1,828,433	25,234	401,191	2,254,858
Malaysia	677,202	1,688,110	750,000	3,115,312	2,510,669	-	604,643	3,115,312
Myanmar	3,619,618	20,239,067	-	23,858,685	20,291,837	789,100	2,777,748	23,858,685
Philippines	3,424,300	10,911,377	707,668	15,043,345	12,411,607	538	2,631,200	15,043,345
Singapore	50,000	-	354,456	404,456	275,347	84,409	44,700	404,456
Thailand	8,097,629	23,762,507	nil	31,860,136	12,084,000	10,706,229	9,069,907	31,860,136
Vietnam	4,341,187	25,916,337	-	30,257,524	19,468,057	7,105,000	3,684,467	30,257,524

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	23,210,346	131,712,976	2,926,590	157,849,911	113,044,241	17,656,194	27,149,476	157,849,911
Brunei	11,436	1,497	30,112	43,044	32,747	-	10,297	43,044
Cambodia	912,492	5,618,794	-	6,531,286	3,302,498	1,948,412	1,280,376	6,531,286
Indonesia	3,072,562	40,286,671	1,148,727	44,507,960	40,451,378	811	4,055,771	44,507,960
Lao PDR	401,191	2,131,200	15,383	2,547,774	2,105,304	20,883	421,587	2,547,774
Malaysia	604,643	1,722,441	737,557	3,064,641	2,439,169	832	624,640	3,064,641
Myanmar	2,777,748	18,311,053	-	21,088,801	18,426,617	1,000,000	1,662,184	21,088,801
Philippines	2,631,200	11,755,998	644,811	15,032,009	12,991,612	256	2,040,141	15,032,009
Singapore ^{1/}	44,700	-	350,000	394,700	270,000	85,000	39,700	394,700
Thailand	9,069,907	25,147,789	nil	34,217,696	13,177,000	6,500,000	14,540,696	34,217,696
Vietnam	3,684,467	26,737,533	-	30,422,000	19,847,916	8,100,000	2,474,084	30,422,000

Table 9 Rice balance sheet of ASEAN countries, 2013 (milled rice)

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	27,149,476	131,508,261	3,253,349	161,911,086	114,571,939	18,275,216	29,063,931	161,911,086
Brunei	10,297	1,705	31,015	43,017	33,892	-	9,125	43,017
Cambodia	1,280,376	5,955,521	-	7,235,897	3,319,010	1,954,257	1,962,630	7,235,897
Indonesia	4,055,771	40,805,600	1,510,329	46,371,700	40,530,277	959	5,840,464	46,371,700
Lao PDR	421,587	2,319,000	15,500	2,756,087	2,308,400	35,000	412,687	2,756,087
Malaysia	624,640	1,644,427	850,000	3,119,067	2,593,630	-	525,437	3,119,067
Myanmar	1,662,184	17,718,391	-	19,380,575	18,126,342	1,000,000	254,233	19,380,575
Philippines	2,040,141	11,815,790	496,505	14,352,436	13,053,915	-	1,298,521	14,352,436
Singapore ^{1/}	39,700	-	350,000	389,700	270,000	85,000	34,700	389,700
Thailand	14,540,696	24,323,884	nil	38,864,580	14,093,386	8,000,000	16,771,194	38,864,580
Vietnam	2,474,084	26,923,943	-	29,398,027	20,243,086	7,200,000	1,954,941	29,398,027

Note: ^{1/} The value is estimated by AFSIS Project, nil = very small amount

Table 10 Ratio of rice production to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	128,152,462	111,664,371	114.77	131,712,976	113,044,241	116.51	131,508,261	114,571,939	114.78
Brunei	1,480	33,315	4.44	1,497	32,747	4.57	1,705	33,892	5.03
Cambodia	5,279,649	3,035,913	173.91	5,618,794	3,302,498	170.14	5,955,521	3,319,010	179.44
Indonesia	38,417,477	39,725,193	96.71	40,286,671	40,451,378	99.59	40,805,600	40,530,277	100.68
Lao PDR	1,936,458	1,828,433	105.91	2,131,200	2,105,304	101.23	2,319,000	2,308,400	100.46
Malaysia	1,688,110	2,510,669	67.24	1,722,441	2,439,169	70.62	1,644,427	2,593,630	63.40
Myanmar	20,239,067	20,291,837	99.74	18,311,053	18,426,617	99.37	17,718,391	18,126,342	97.75
Philippines	10,911,377	12,411,607	87.91	11,755,998	12,991,612	90.49	11,815,790	13,053,915	90.52
Singapore	-	275,347	-	-	270,000	-	-	270,000	-
Thailand	23,762,507	12,084,000	196.64	25,147,789	13,177,000	190.85	24,323,884	14,093,386	172.59
Vietnam	25,916,337	19,468,057	133.12	26,737,533	19,847,916	134.71	26,923,943	20,243,086	133.00

Table 11 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	22,639,455	111,664,371	20.27	23,210,346	113,044,241	20.53	27,149,476	114,571,939	23.70
Brunei	15,885	33,315	47.68	11,436	32,747	34.92	10,297	33,892	30.38
Cambodia	516,633	3,035,913	17.02	912,492	3,302,498	27.63	1,280,376	3,319,010	38.58
Indonesia	1,637,082	39,725,193	4.12	3,072,562	40,451,378	7.60	4,055,771	40,530,277	10.01
Lao PDR	259,919	1,828,433	14.22	401,191	2,105,304	19.06	421,587	2,308,400	18.26
Malaysia	677,202	2,510,669	26.97	604,643	2,439,169	24.79	624,640	2,593,630	24.08
Myanmar	3,619,618	20,291,837	17.84	2,777,748	18,426,617	15.07	1,662,184	18,126,342	9.17
Philippines	3,424,300	12,411,607	27.59	2,631,200	12,991,612	20.25	2,040,141	13,053,915	15.63
Singapore	50,000	275,347	18.16	44,700	270,000	16.56	39,700	270,000	14.70
Thailand	8,097,629	12,084,000	67.01	9,069,907	13,177,000	68.83	14,540,696	14,093,386	103.17
Vietnam	4,341,187	19,468,057	22.30	3,684,467	19,847,916	18.56	2,474,084	20,243,086	12.22

Table 12 Quantity and Value of Rice Export by Countries of Destination in 2012

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									31	45,184				
Lao PDR														
Malaysia					641	372,775								
Myanmar														
Philippines					53	450,500			0.31	1,920				
Singapore														
Thailand	37,086	42,881,939	6,148	2,401,205	312,361	174,751,544	9,706	5,319,081	55,211	52,718,847	886	632,813	2,400	2,154,795
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	229	347,886					260	393,070	551	557,863	811	950,933
Lao PDR											20,883	9,432,484
Malaysia	161	88,621					802	461,396	30	30,150	832	491,546
Myanmar												
Philippines	15	15,000			87	326,000	155	793,420	101	384,146	256	1,177,566
Singapore												
Thailand	107,857	100,181,784			3,249	2,152,812	534,905	383,194,820	5,060,276	4,535,126,354	5,595,181	4,918,321,174
Vietnam												

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

Table 13 Quantity and Value of Rice Import by Countries of Origin in 2012

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											8,995	3,697,913	53	452,523
Lao PDR														
Malaysia			17,935	17,018,469	32	50,451					2,125	968,272		
Myanmar														
Philippines			500	56,736	0.25	728					17,289	6,714,388		
Singapore														
Thailand			1,155.00	110,987			4	2,026		39	19,873.68	6,380,960	0.09	397
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												
Cambodia												
Indonesia			341,971	199,610,924	526,860	302,312,203	877,880	506,073,563	270,847	135,821,677	1,148,727	641,895,240
Lao PDR											15,383	12,512,639
Malaysia			56,569	57,560,250	538,698	300,364,254	615,359	375,961,696	122,198	74,216,141	737,557	450,177,837
Myanmar												
Philippines	652	205,951	2,463	814,851	534,581	237,445,766	555,485	245,238,420	89,326	31,085,225	644,811	276,323,645
Singapore												
Thailand	0.01	105			44.21	45,747	21,077	6,540,261	1,901	1,899,214	22,978	8,439,475
Vietnam												

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

Table 14 FOB Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Cambodia	Milled Rice 5%	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	680	610	600	570	660	730	740	634
Thailand	Hom Mali Rice	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	1,050	1,064	1,063	1,085	1,118	1,121	1,078	1,078	1,078
	Milled Rice 5%	2010	570	542	498	459	447	445	438	454	485	493	524	547	492
		2011	525	532	504	490	483	507	539	568	610	606	639	595	550
		2012	540	551	551	557	610	610	583	569	585	579	582	582	575
Vietnam	Milled Rice 5%	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	594	524
		2012	572	489	461	435	448	437	433	447	449	474			465
Myanmar	Milled Rice 25%	2010	330	336	351	345	346	340	337	331	333	339	366	385	345
		2011	388	389	384	394	391	393	385	386	395	376	389	395	389
		2012	384	352	326	326	332	348							345
Indonesia	Glutinous Rice	2010	1,336	237	322	736	680	219	786	839	1,200	676	1,441	1,427	825
		2011		1,645	1,577	1,683		1,407			1,593	1,120	1,260	1,265	1,444

Table 15 CIF Price of rice in selected ASEAN countries

Unit: US\$/Ton

Country	Grade	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Philippines	Philippines Milled Rice 5%	2010	646	703	743	713	699	683	736	770					712
		2011				466	560	534	500	509	554				521
		2012				491	456	444							464
	Philippines Rice 10%-25%	2010	365	676		462		448	422	659	371				486
		2011		626		620	517	459	508	512	641	555			555
		2012	276	288	305	284	464	451							345
	Broken rice	2010			546	481	375		448						463
		2011						353	639	530	656		541	483	534
		2012	246	336	306		452	488							366
Malaysia	Malaysia Fragrant Rice	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	707	606	858	517	587	784	669	579	599				656
Singapore	Not specified	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
		2012	576	519	524	537	824	602	559	518					582

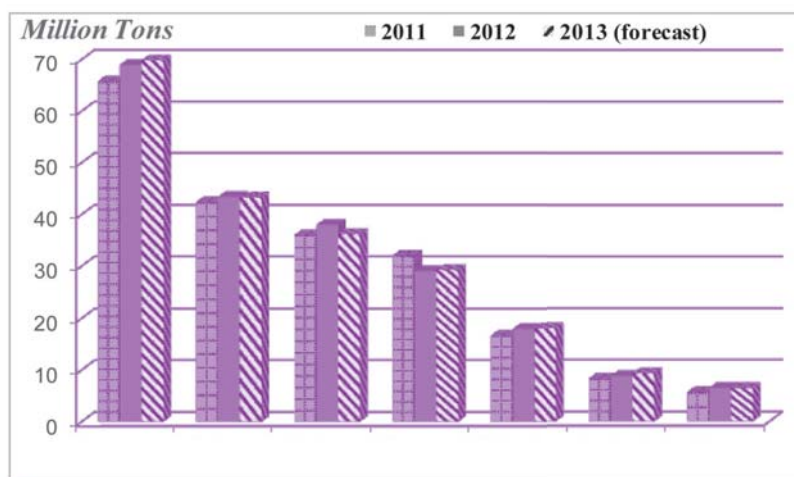


Figure 1 Paddy production of selected countries in ASEAN, 2011-2013

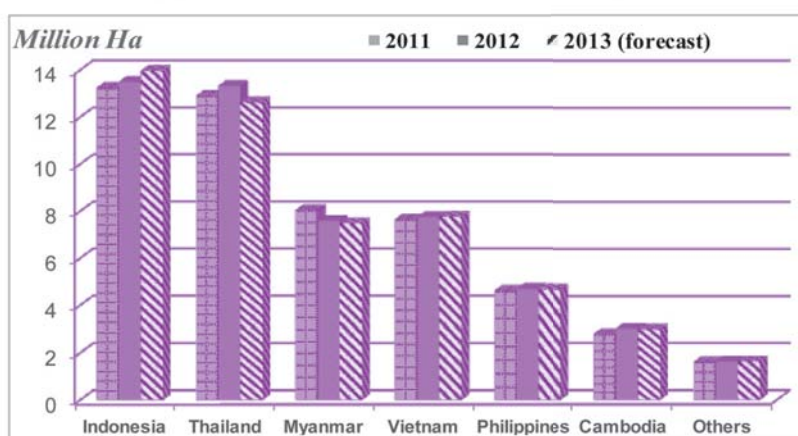


Figure 2 Paddy planted area of selected countries in ASEAN, 2011-2013

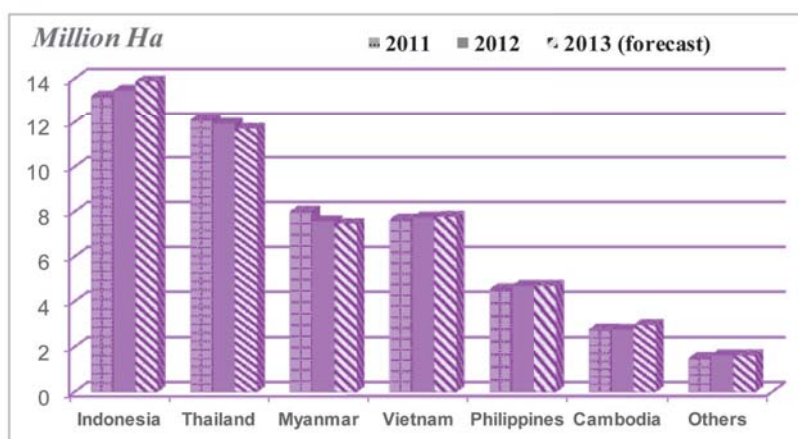


Figure 3 Paddy harvested area of selected countries in ASEAN, 2011-2013

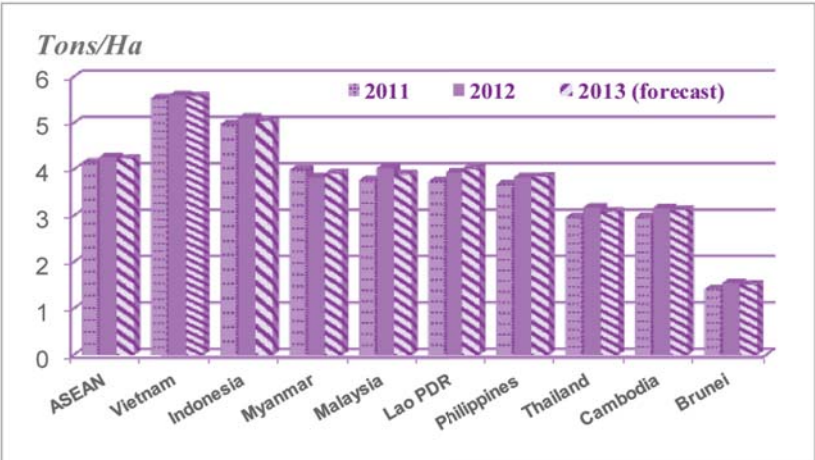


Figure 4 Paddy yield of countries in ASEAN, 2011-2013

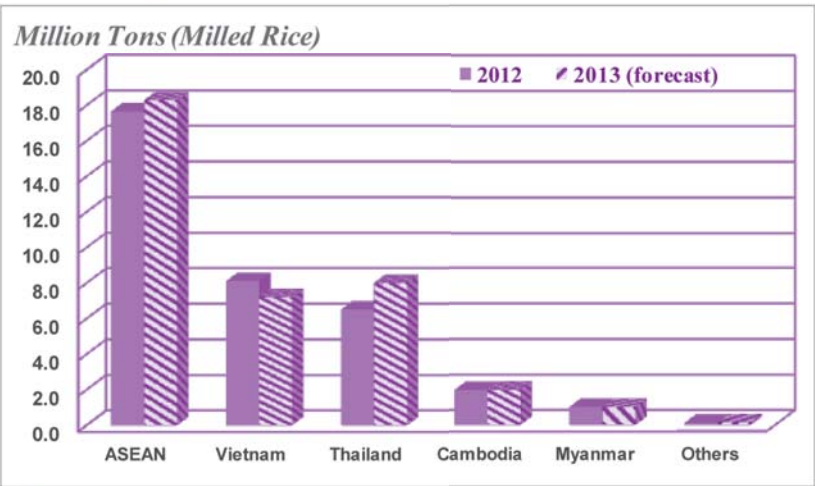


Figure 5 Amount of rice export (million tons) of selected countries in ASEAN in 2012-2013

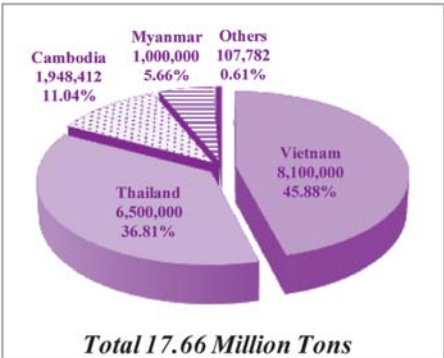


Figure 6 Share of rice export (tons) among ASEAN countries, 2012

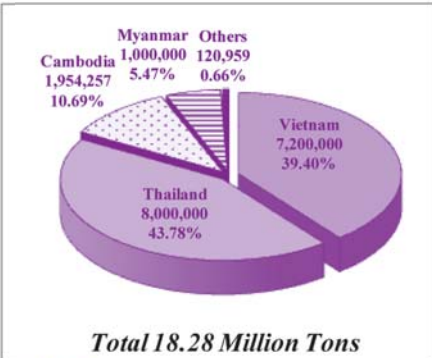


Figure 7 Share of rice export (tons) among ASEAN countries, 2013

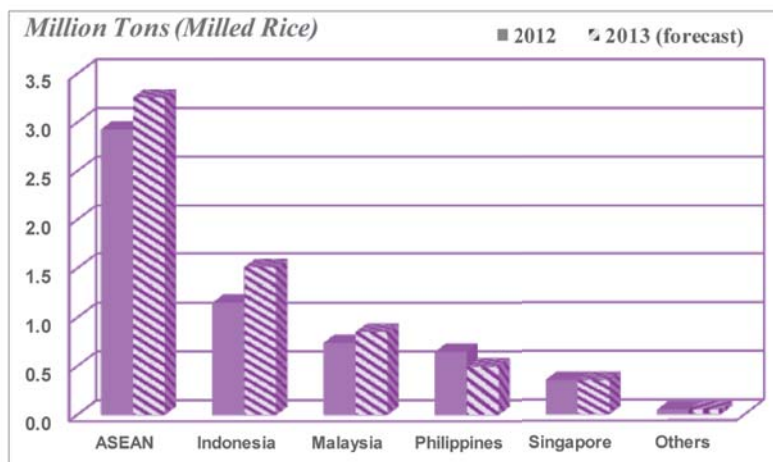


Figure 8 Amount of rice import (million tons) by selected countries in ASEAN in 2012-2013



Figure 9 Share of rice import (tons) among ASEAN countries, 2012

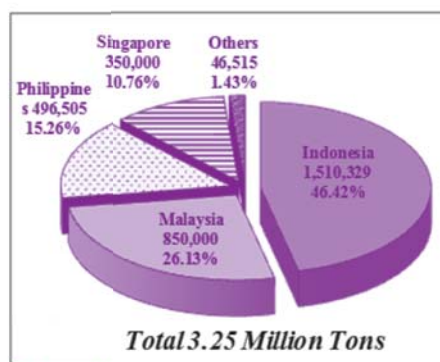


Figure 10 Share of rice import (tons) among ASEAN countries, 2013

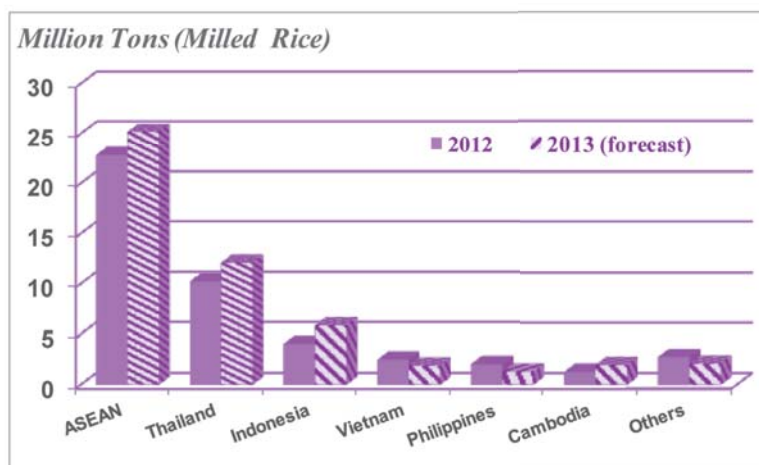


Figure 11 Amount of ending stock of rice in ASEAN countries in 2012-2013

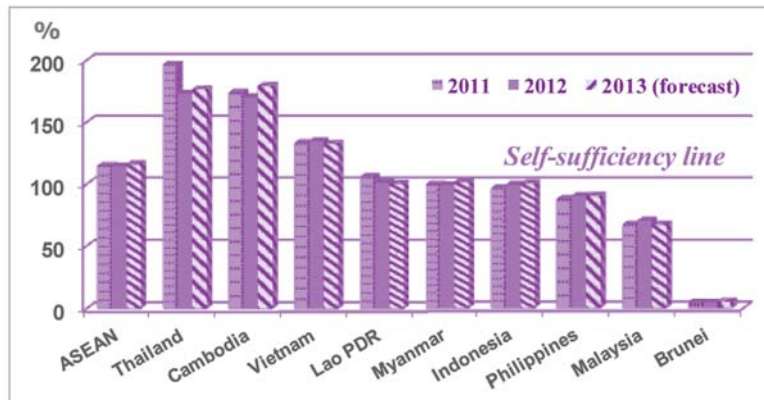


Figure 12 Ratio of rice production to domestic utilization in ASEAN countries, 2011-2013

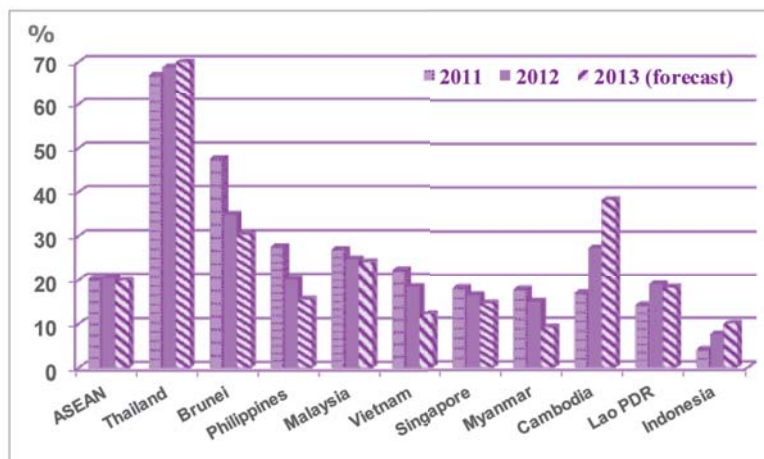


Figure 13 Ratio of rice beginning stock to domestic utilization in ASEAN countries, 2011-2013

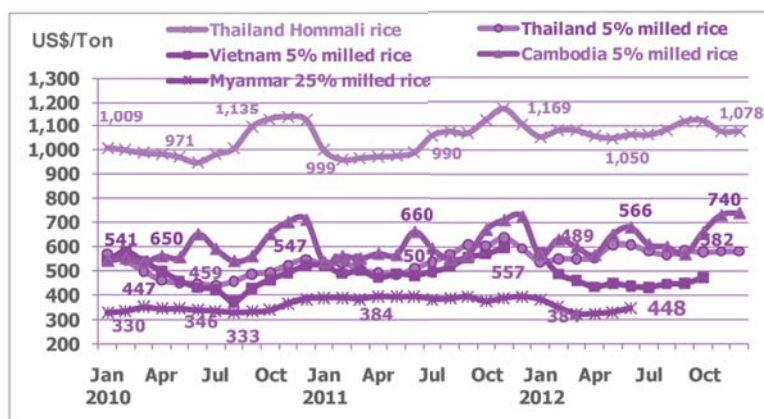


Figure 14 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2010-2012

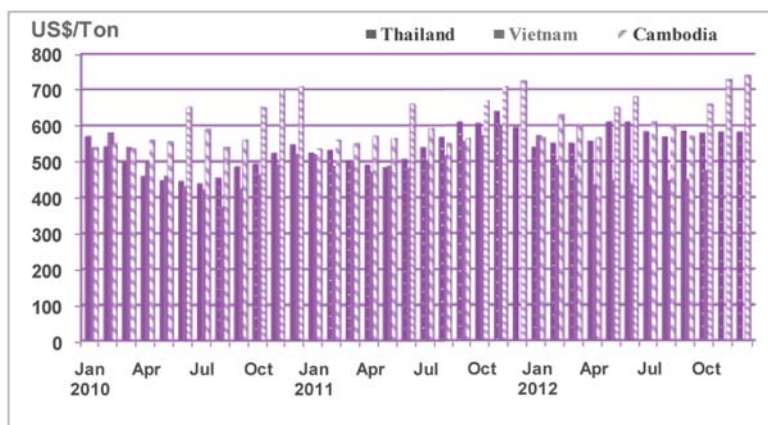


Figure 15 FOB price (US\$/Ton) of milled rice of selected countries in ASEAN in 2010-2012

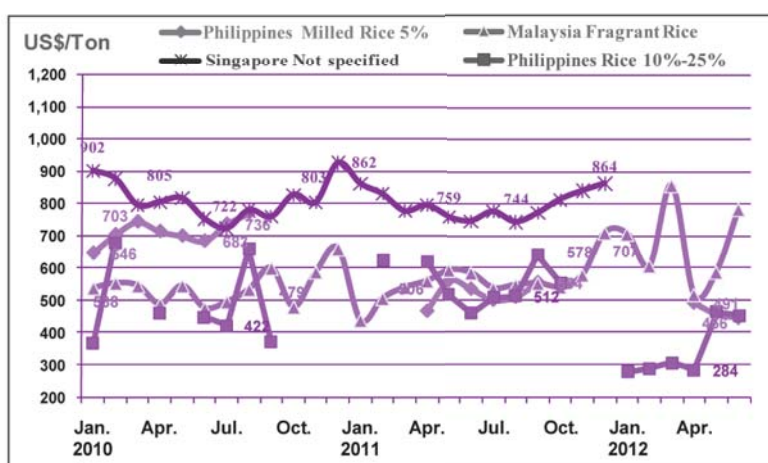


Figure 16 CIF price (US\$/Ton) of milled rice of selected countries in ASEAN in 2010-2012





Highlights of Maize Outlook for 2013

- Maize supply in ASEAN is forecast to decrease from 50.87 million tons in 2012 (crop year 2011/12) to 50.19 million tons in 2013 (crop year 2012/13), a decrease of 0.69 million tons or about 1 percent due to decrease in beginning stock and production (Table 16).
- Maize production is forecast to reduce slightly from 39.78 million tons in 2012 to 39.49 million tons in 2013 (Table 17).
- For the demand side, it is expected to reduce about 1 percent from 50.87 million tons to 50.19 million tons for the same period.
- Maize export from the ASEAN is predicted to be 1.17 million tons in 2013 compared to 1.50 million tons in 2012 which is about 22 percent reduction. For the import, it is forecast to be 6.19 million tons in 2013, an increase from 5.70 million tons or about 9 percent from the previous year.
- The production to domestic utilization ratio (self-sufficiency ratio) is forecast to be about 89 percent which is about the same situation as in 2012.
- The beginning stock to domestic utilization ratio (food security ratio) in 2013 is forecast to be about 10 percent from 12 percent in 2012 which indicated that the situation is not secured enough in terms of feed supply for the region.

Table 16 Summary of the ASEAN maize situation, 2011-2013

Unit: Million tons

Items	2012	2013	Change	
			Quantity	%
Supply (Million tons)	50.87	50.19	-0.69	-1.35
Beginning stock	5.40	4.51	-0.88	-16.37
Production	39.78	39.49	-0.29	-0.74
Import	5.70	6.19	0.49	8.58
Demand (Million tons)	50.87	50.19	-0.68	-1.34
Domestic utilization	44.86	44.38	-0.48	-1.07
Export	1.50	1.17	-0.33	-21.80
Ending stock	4.51	4.64	0.13	2.79
Ratio of production to domestic utilization (%)	88.67	88.98	0.31	-
Ratio of beginning stock to domestic utilization (%)	12.03	10.17	-1.86	-

ASEAN Maize Situation in 2012

Production

The maize production in ASEAN in 2012 (crop year 2011/12) was estimated at 39.78 million tons, an increase of 2.58 million tons or about 7 percent from 37.20 million tons in 2011. The increase has occurred in every producing country in the region. The most increase, in terms of percentage, was found in Cambodia. Indonesia, the biggest maize producing country in the region, has the most increase in terms of quantity. The Philippines, the second largest in maize production, has also increased its production significantly. Thailand and Vietnam, the other major maize producing countries showed slightly increase in their production (Table 17, Figure 17).

The increase in production in **Indonesia** came from the expansion of the planted area due to the increase in price of maize and favorable weather including the government policy. For **the Philippines** the

increase in production derived from the increase in both area and yield. The increase in area attributed to the farmer responded to the price increase together with the favorable weather while the increase in yield was due to the increase in using the improved variety. The increase in production in **Thailand** was dominated by the increase in area planted in spite of the yield had slightly decreased. The increase in area came from the farmers responded to the price increase as a result of the government mortgage scheme. For **Vietnam**, the production has increased as a result of the increase in the yield while the area has decreased. The decrease in the area attributed to the unfavorable weather while the increase in yield came from the increase in using improved variety. The increase in production in **Myanmar** derived from the increase in both area and yield. The increase in the area was due to the favorable weather. For **Lao PDR**, the increase in production was mainly due to the area expansion as a result of price increase. In **Cambodia**, the increase in production attributed only to the increase in area while the yield has slightly decreased (Table 17-20, Figure 17-20).

Utilization and Stock

Maize utilization in the ASEAN in 2012 was estimated at 44.86 million tons, an increase of 2.71 million tons compared to 42.15 million tons in 2011 (Table 22-23). Most of the maize production is used for animal feed not for making ethanol. The increase in domestic utilization of maize has occurred in most countries except in Brunei, Lao PDR, Myanmar and Singapore.

The beginning stock of maize in the ASEAN in 2012 was estimated at 5.40 million tons, an increase of 0.65 million tons or about 14 percent from 4.74 million tons in the previous year. The ratio of maize production to domestic utilization for the whole ASEAN in 2012 was estimated at about 89 percent which is about the same as previous year. This indicated that ASEAN by itself produced maize not sufficient for regional consumption

(Table 25, Figure 28). On the country by country basis, Cambodia and Lao PDR have the ratio well above 100 percent. For Thailand, Myanmar and the Philippines, the ratios were at the border line of self-sufficiency. For the rest of producing countries (Indonesia and Vietnam), the ratio were under 100 percent.

The ratio of beginning stock to the domestic utilization for the ASEAN was estimated to be about 12 percent indicated that the region is not yet secured enough in terms of feed requirement (Table 26, Figure 29). Thailand is the only country in the region that has the ratio above 20 percent which, in general, considered as the optimum point for food/feed security.

Trade

Although the ASEAN as a whole could not produce maize enough for regional consumption the ASEAN is still able to export some of its maize production. The maize exported from the ASEAN in 2012 was 1.50 million tons compared to 5.70 million tons of maize import. Cambodia and Lao PDR are the two major maize exporters and followed by Thailand and Myanmar respectively. The major importing countries in the regions were Malaysia, Indonesia and Vietnam. Thailand was also imported about 0.30 million tons which was higher than the 0.15 million tons of maize exported (Table 22-23, Figure 21, 22, 24 and 25). 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 27-28.

Prices

The monthly FOB prices for maize exporting countries and CIF prices for importing countries between 2010-2012 are shown in Table 29-30 and Figure 30-31. The annual average of Thailand FOB prices in 2012 was higher than other countries. For Myanmar and Thailand the 2012 average FOB price were higher than in 2011. For Cambodia the average

FOB prices in 2011 and 2012 were almost the same. The average CIF prices in the Philippines in 2012 448 US\$ /ton for in quota and 432 US\$/ton in out-quota. For Malaysia, the average CIF prices in 2012 was 244 US\$/ton.

Damaged Area

The damaged area of maize in 2012 was reported to be 38,648 hectares of which 17,897 hectares caused by the drought, 11,453 hectares caused by the pests and 8,952 hectares caused by the flood. The most affected area in all cases had occurred in Thailand (Table 21).

Prospects for Maize in 2013

Production

Maize production in 2013 in the ASEAN is forecast to be 39.49 million tons, a decrease of 0.29 million tons which is less than 1 percent from 39.79 million tons in 2012. The reduction in regional production came from the reduction in Indonesia, Thailand and Cambodia. The decrease in Indonesia is forecast due to the competition with other crops. In Thailand, the decrease in production is forecast to be very small due to the slightly decrease in the yield. For Cambodia, the decrease in production attributed to the reduction in area due to the completion with other crops.

For the Philippines, the 2013 production is forecast to be increased about 7 percent from 7.42 million tons to 7.91 million tons derived from the expected increase in both area planted and yield due to the response of the price increase (Table 17-20, Figure 17-20).

Utilization and Stock

The domestic utilization of maize in the ASEAN is forecast to be 44.38 million tons in 2013, down 0.48 million tons from 44.86 million tons in 2012 (Table 23-24). Regarding the beginning stock for the year 2013, the

ASEAN as a whole is estimated to carry maize stock about 4.51 million tons, down about 0.23 million tons or 5 percent from 4.74 million tons in 2012.

The ratio of production to domestic utilization is expected to be 89 percent which is about the same as in 2012 (Table 25, Figure 28). The ratio of beginning stock to domestic utilization ratio is forecast to decrease from 12 percent to 10 percent which is less secure than in 2012 (Table 26, Figure 29).

Trade

The maize export from the ASEAN in 2013 is projected to be 1.17 million tons compared to 1.50 million tons in 2012. For the import by the ASEAN it is forecast to increase from 5.70 million tons in 2012 to 6.19 million tons in 2013 or increase about 9 percent (Table 23-24, Figure 21, 23, 24 and 26).

Table 17 Maize production in ASEAN countries, 2011-2013

Unit: 1,000 Tons

Country	2011 (2010/11)	2012 (2011/12)	change		2013 (2012/13)	change	
			Quantities	(%)		Quantities	(%)
ASEAN	37,197.39	39,779.56	2,582.17	6.94	39,486.63	-292.93	-0.74
Brunei	-	-	-	-	-	-	-
Cambodia	717.19	940.38	223.20	31.12	840.90	-99.48	-10.58
Indonesia	17,643.25	19,225.45	1,582.20	8.97	18,413.34	-812.11	-4.22
Lao PDR	911.38	1,052.31	140.93	15.46	1,065.94	13.63	1.30
Malaysia	-	-	-	-	-	-	-
Myanmar	1,354.64	1,484.97	130.33	9.62	1,493.37	8.40	0.57
Philippines	6,971.22	7,417.57	446.35	6.40	7,912.37	494.80	6.67
Singapore	-	-	-	-	-	-	-
Thailand	4,814.11	4,861.59	47.48	0.99	4,856.92	-4.67	-0.10
Vietnam	4,785.60	4,797.30	11.70	0.24	4,903.80	106.50	2.22

Table 18 Maize planted area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	9,444.51	9,967.11	522.60	5.53	9,742.53	-224.58	-2.25
Brunei	-	-	-	-	-	-	-
Cambodia	174.26	215.39	41.13	23.60	190.56	-24.82	-11.53
Indonesia	3,864.89	4,267.70	402.81	10.42	3,952.80	-314.90	-7.38
Lao PDR	180.39	203.61	23.22	12.87	205.00	1.40	0.69
Malaysia	-	-	-	-	-	-	-
Myanmar	389.44	411.68	22.25	5.71	414.36	2.68	0.65
Philippines	2,556.08	2,594.37	38.29	1.50	2,695.03	100.65	3.88
Singapore	-	-	-	-	-	-	-
Thailand	1,147.37	1,161.87	14.50	1.26	1,170.79	8.92	0.77
Vietnam	1,132.10	1,112.50	-19.60	-1.73	1,114.00	1.50	0.13

Table 19 Maize harvested area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	9,381.98	9,928.46	546.48	5.82	9,700.57	-227.90	-2.30
Brunei	-	-	-	-	-	-	-
Cambodia	159.79	215.24	55.44	34.70	189.76	-25.47	-11.84
Indonesia	3,864.69	4,265.71	401.01	10.38	3,947.56	-318.15	-7.46
Lao PDR	180.39	203.61	23.22	12.87	205.00	1.40	0.69
Malaysia	-	-	-	-	-	-	-
Myanmar	389.07	411.48	22.41	5.76	411.43	-0.05	-0.01
Philippines	2,544.61	2,593.93	49.32	1.94	2,695.03	101.10	3.90
Singapore	-	-	-	-	-	-	-
Thailand	1,111.33	1,126.01	14.67	1.32	1,137.78	11.78	1.05
Vietnam	1,132.10	1,112.50	-19.60	-1.73	1,114.00	1.50	0.13

Table 20 Maize Yield in ASEAN countries, 2011-2013

Unit: Ton/Hectare

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	3.96	4.01	0.05	1.26	4.07	0.06	1.50
Brunei	-	-	-	-	-	-	-
Cambodia	4.49	4.37	-0.12	-2.67	4.43	0.06	1.37
Indonesia	4.57	4.51	-0.06	-1.31	4.66	0.15	3.33
Lao PDR	5.05	5.17	0.12	2.38	5.20	0.03	0.58
Malaysia	-	-	-	-	-	-	-
Myanmar	3.48	3.61	0.13	3.74	3.63	0.02	0.55
Philippines	2.74	2.86	0.12	4.38	2.94	0.08	2.80
Singapore	-	-	-	-	-	-	-
Thailand	4.33	4.32	-0.01	-0.23	4.27	-0.05	-1.16
Vietnam	4.23	4.31	0.08	1.89	4.40	0.09	2.09

Table 21 Maize damaged area in ASEAN by cause of damage, 2012

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	8,952	17,897	11,453	-	-	346	38,648
Brunei	-	-	-	-	-	-	-
Cambodia	-	150	-	-	-	-	150
Indonesia	-	-	1,989	-	-	-	1,989
Lao PDR	-	-	-	-	-	-	0
Malaysia	-	-	-	-	-	-	-
Myanmar	204	-	-	-	-	-	204
Philippines	95	-	-	-	-	346	441
Singapore	-	-	-	-	-	-	-
Thailand	8,653	17,747	9,464	-	-	-	35,864
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

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

Table 22 Maize balance sheet of ASEAN countries, 2011

Unit : Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	4,744,339	37,197,386	6,878,311	48,820,036	42,153,624	1,271,410	5,395,002	48,820,036
Brunei	n.a.	-	4,581	4,581	4,581	-	n.a.	4,581
Cambodia	43,384	717,188	-	760,572	150,608	585,998	23,966	760,572
Indonesia	1,838,012	17,643,250	2,682,000	22,163,262	19,763,819	6,000	2,393,443	22,163,262
Lao PDR	87,183	911,380	7,392	1,005,955	780,058	167,989	57,908	1,005,955
Malaysia	317,000	-	2,905,593	3,222,593	2,889,850	6,550	326,193	3,222,593
Myanmar	406,860	1,354,638	-	1,761,498	1,450,431	185,900	125,167	1,761,498
Philippines	152,500	6,971,221	66,193	7,189,914	7,024,002	12	165,900	7,189,914
Singapore	-	-	17,000	17,000	17,000	-	-	17,000
Thailand	1,363,896	4,814,109	195,552	6,373,557	4,355,916	318,961	1,698,680	6,373,557
Vietnam	535,504	4,785,600	1,000,000	6,321,104	5,717,359	-	603,745	6,321,104

Table 23 Maize balance sheet of ASEAN countries, 2012

Unit : Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,395,002	39,779,559	5,699,327	50,873,888	44,860,587	1,500,971	4,512,330	50,873,888
Brunei	n.a.	-	2,863	2,863	2,863	-	n.a.	2,863
Cambodia	23,966	940,383	-	964,349	151,361	673,897	139,091	964,349
Indonesia	2,393,443	19,225,449	1,184,083	22,802,975	21,745,957	57,419	999,599	22,802,975
Lao PDR	57,908	1,052,305	21,823	1,132,036	534,243	494,644	103,149	1,132,036
Malaysia	326,193	-	3,060,000	3,386,193	3,000,000	15,000	371,193	3,386,193
Myanmar	125,167	1,484,966	-	1,610,133	1,358,857	110,000	141,276	1,610,133
Philippines	165,900	7,417,571	114,558	7,698,029	7,558,618	11	139,400	7,698,029
Singapore ^{1/}	-	-	16,000	16,000	16,000	-	-	16,000
Thailand	1,698,680	4,861,585	300,000	6,860,265	4,670,000	150,000	2,040,265	6,860,265
Vietnam	603,745	4,797,300	1,000,000	6,401,045	5,822,688	-	578,357	6,401,045

Table 24 Maize balance sheet of ASEAN countries, 2013

Unit : Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	4,512,330	39,486,630	6,187,741	50,186,701	44,377,654	1,172,774	4,636,273	50,186,701
Brunei	n.a.	-	2,949	2,949	2,949	-	n.a.	2,949
Cambodia	139,091	840,900	-	979,991	152,114	677,266	150,611	979,991
Indonesia	999,599	18,413,341	1,882,361	21,295,301	20,263,292	35,140	996,869	21,295,301
Lao PDR	103,149	1,065,935	15,000	1,184,084	852,748	200,000	131,336	1,184,084
Malaysia ^{1/}	371,193	-	2,993,837	3,365,030	2,963,899	6,655	394,476	3,365,030
Myanmar	141,276	1,493,370	-	1,634,646	1,379,488	110,000	145,158	1,634,646
Philippines	139,400	7,912,369	57,241	8,109,010	7,979,370	-	129,640	8,109,010
Singapore ^{1/}	-	-	16,000	16,000	16,000	-	-	16,000
Thailand	2,040,265	4,856,915	220,353	7,117,533	4,634,404	143,713	2,339,416	7,117,533
Vietnam	578,357	4,903,800	1,000,000	6,482,157	6,133,390	-	348,767	6,482,157

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

Table 25 Ratio of maize production to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	37,197,386	42,153,624	88.24	39,779,559	44,860,587	88.67	39,486,630	44,377,654	88.98
Brunei	-	4,581	-	-	2,863	-	n.a.	2,949	-
Cambodia	717,188	150,608	476.20	940,383	151,361	621.28	840,900	152,114	552.81
Indonesia	17,643,250	19,763,819	89.27	19,225,449	21,745,957	88.41	18,413,341	20,263,292	90.87
Lao PDR	911,380	780,058	116.83	1,052,305	534,243	196.97	1,065,935	852,748	125.00
Malaysia	-	2,889,850	-	-	3,000,000	-	-	2,963,899	-
Myanmar	1,354,638	1,450,431	93.40	1,484,966	1,358,857	109.28	1,493,370	1,379,488	108.26
Philippines	6,971,221	7,024,002	99.25	7,417,571	7,558,618	98.13	7,912,369	7,979,370	99.16
Singapore	-	17,000	-	-	16,000	-	-	16,000	-
Thailand	4,814,109	4,355,916	110.52	4,861,585	4,670,000	104.10	4,856,915	4,634,404	104.80
Vietnam	4,785,600	5,717,359	83.70	4,797,300	5,822,688	82.39	4,903,800	6,133,390	79.95

Table 26 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	4,744,339	42,153,624	11.25	5,395,002	44,860,587	12.03	4,512,330	44,377,654	10.17
Brunei	n.a.	4,581	-	n.a.	2,863	-	n.a.	2,949	-
Cambodia	43,384	150,608	28.81	23,966	151,361	15.83	139,091	152,114	91.44
Indonesia	1,838,012	19,763,819	9.30	2,393,443	21,745,957	11.01	999,599	20,263,292	4.93
Lao PDR	87,183	780,058	-	57,908	534,243	-	103,149	852,748	-
Malaysia	317,000	2,889,850	10.97	326,193	3,000,000	10.87	371,193	2,963,899	12.52
Myanmar	406,860	1,450,431	28.05	125,167	1,358,857	9.21	141,276	1,379,488	10.24
Philippines	152,500	7,024,002	2.17	165,900	7,558,618	2.19	139,400	7,979,370	1.75
Singapore	-	17,000	-	-	16,000	-	-	16,000	-
Thailand	1,363,896	4,355,916	31.31	1,698,680	4,670,000	36.37	2,040,265	4,634,404	44.02
Vietnam	535,504	5,717,359	9.37	603,745	5,822,688	10.37	578,357	6,133,390	9.43

Table 27 Quantity and Value of Maize Export by Countries of Destination in 2012

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									1,078	530,106			41,441	15,509,936
Lao PDR														
Malaysia	60	25,451	0.1	98	4	9,196								
Myanmar														
Philippines					0.24	1,057								
Singapore														
Thailand							240	69,187					73,650	22,425,576
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	330	225,690	1,432	841,514	5,650	6,307,711	49,932	23,414,957		7,487	3,334,271		57,419	26,749,228	
Lao PDR													494,644	54,978,646	
Malaysia	16	18,499					80	53,244		661	2,023,755		741	2,076,999	
Myanmar															
Philippines					11	12,972	10.94	14,029					11	14,029	
Singapore															
Thailand					3,300	928,287	77,190	23,423,050		28,792	9,134,302		105,982	32,557,352	
Vietnam															

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

Table 28 Quantity and Value of Maize Import by Countries of Origin in 2012

Quantity: Tons Values: US\$

Exporting Country	Country of Origin											
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia											1	6,069
Lao PDR									4,701	3,824,221		
Malaysia					5	5,363					44	29,409
Myanmar												
Philippines					5,001	1,623,641					8,692	3,022,209
Singapore												
Thailand			28,323	3,853,920			167,149	20,387,075				
Vietnam												

Exporting 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	Quantity	Values	Quantity	Values										
Brunei																
Cambodia																
Indonesia	869	253,446	796	2,274,716			6,367	6,358,452			1,177,715	343,574,092	1,184,083	349,932,544		
Lao PDR							21,823	3,244,816					21,823	3,244,816		
Malaysia	3	674	232	84,616			284	120,060			1,289,970	365,198,434	1,290,254	365,318,494		
Myanmar																
Philippines			68,318	26,148,671			82,025	30,816,540			32,533	36,382,150	114,558	67,198,690		
Singapore																
Thailand							195,472	24,240,995			80	9,171	195,552	24,250,166		
Vietnam																

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

Table 29 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
Indonesia	2011	234	487	1,400	304	2,261	908	646	648	317	707	433	684	752
	2012	402	513	489	410	454	398	512	651					479
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	255	230	265	245	255	235	235	244
Myanmar	2010	213	193	181	187	208	196		352	267	256	246	241	231
	2011	247	247	252	263	269	285	289	287	291	289	277	286	274
	2012	279	273	313	277	280	500							320
Thailand	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
	2012	331	342	348	351	337	350	351	380	351	341	352	350	349

Table 30 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	2010	243	242	245	249	247	240	245	249	257	259	263	272	251
	2011	210	240	235	250	260	250	235	260	255	250	240	230	243
	2012	218	245	227	255	265	255	230	265	245	255	235	235	244
Philippines In-quota	2010						502	362					469	444
	2011	457	593	312	355	594		429			493		337	446
	2012	366	398	306	584	575	457							448
Out-quota	2010	244	225	320	384	-	288	274	234	342	268	427	627	330
	2011	406	311	317	312	315	557	498	985	501		235	410	441
	2012	271	398	364	567	315	667	442						432
Singapore	20102	46	251	247	242	260	262	282	316	276	302	273	305	272
	2011	279	292	329	340									310
Indonesia	2010	305	306	311	322	336	337	339	341	338	327	317	318	325
	2011	289	292	294	310	297	313	286	284					296

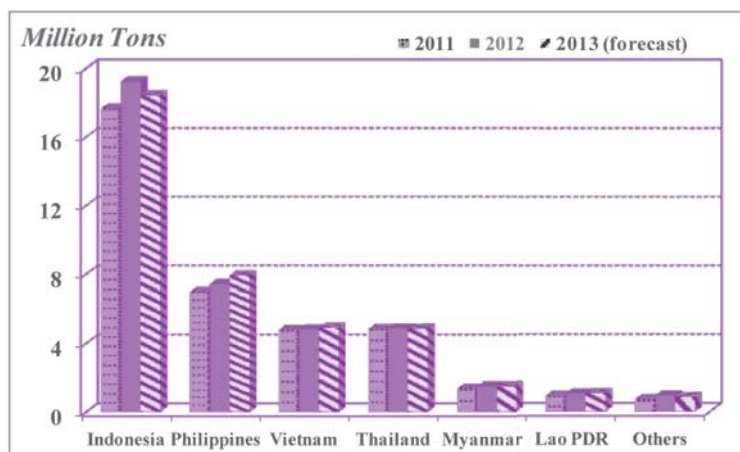


Figure 17 Maize production of selected countries in ASEAN, 2011-2013

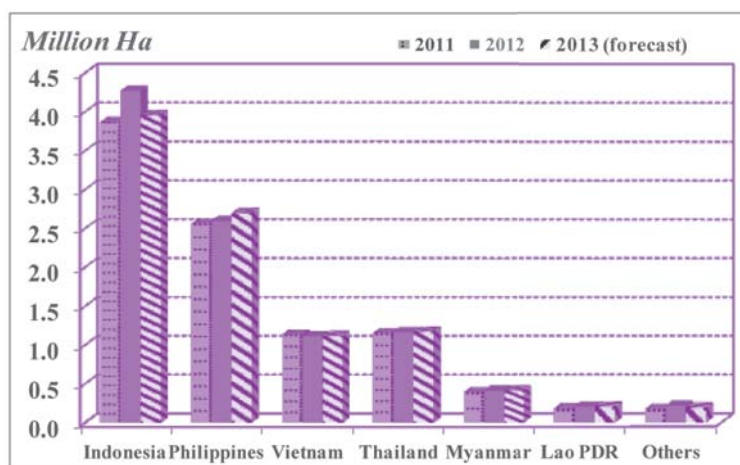


Figure 18 Maize planted area of selected countries in ASEAN, 2011-2013

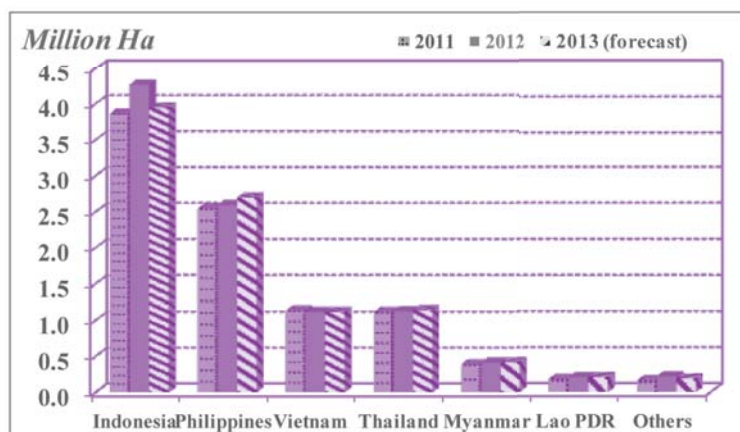


Figure 19 Maize harvested area of selected countries in ASEAN, 2011-2013

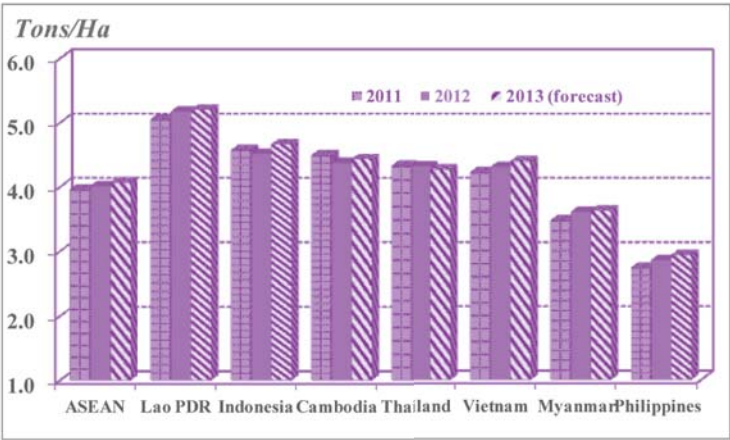


Figure 20 Maize yield of countries in ASEAN, 2011-2013

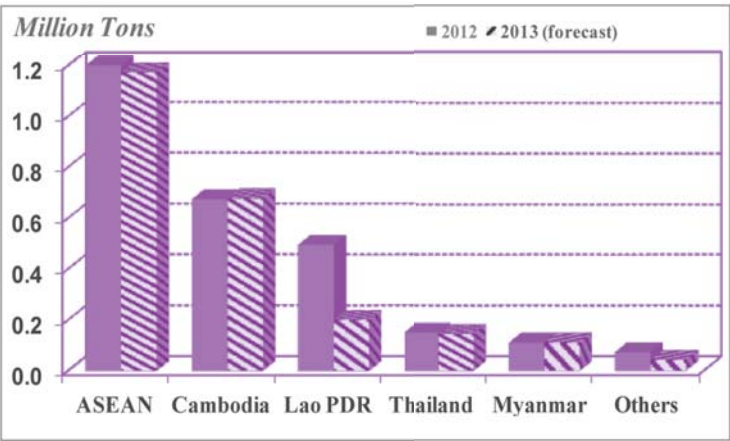


Figure 21 Amount of maize export (million tons) of selected countries in ASEAN in 2012-2013

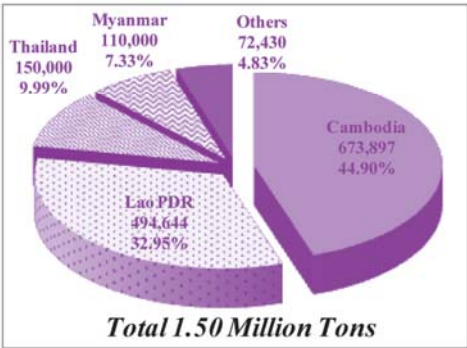


Figure 22 Share of maize export (ton) among ASEAN countries, 2012

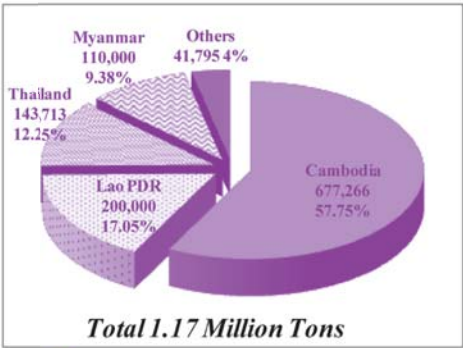


Figure 23 Share of maize export (ton) among ASEAN countries, 2013



Figure 24 Amount of maize import (million tons) by selected countries in ASEAN in 2012-2013

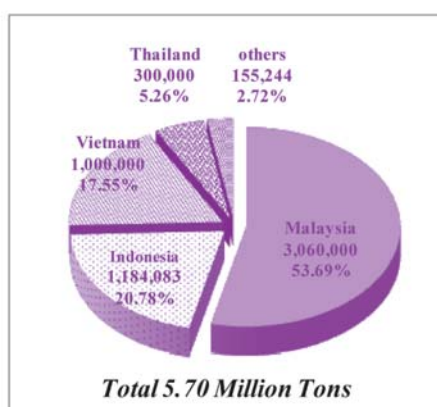


Figure 25 Share of maize import (tons) among ASEAN countries, 2012

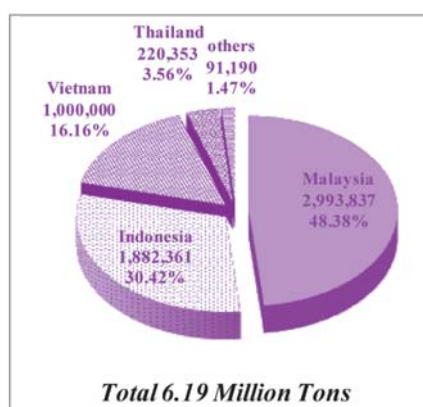


Figure 26 Share of maize import (tons) among ASEAN countries, 2013

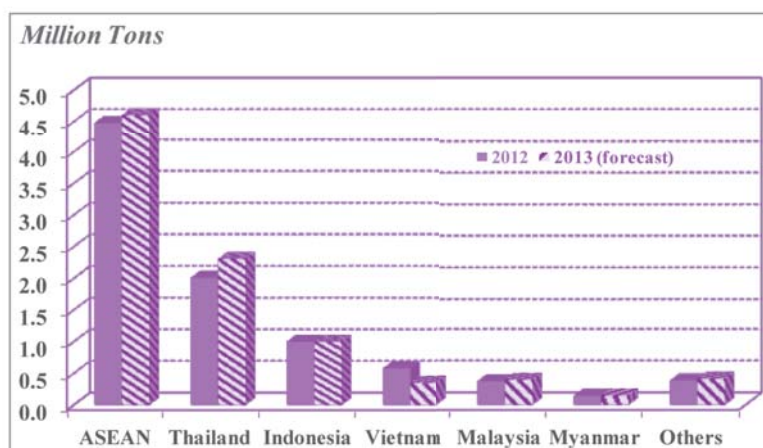


Figure 27 Amount of ending stock of maize in ASEAN countries in 2012-2013

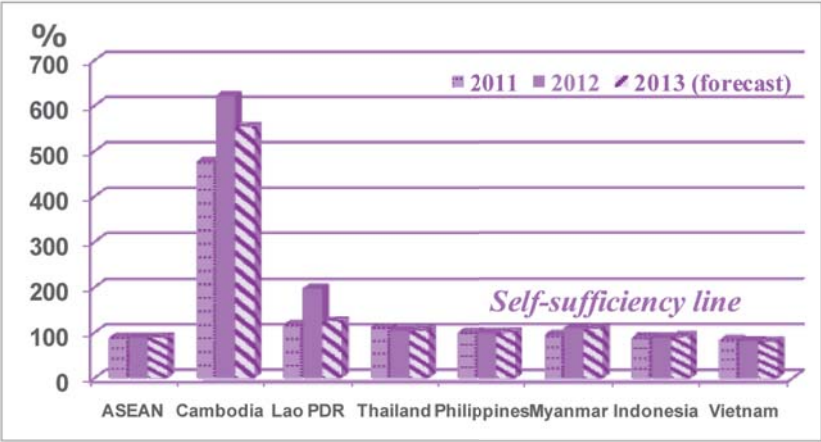


Figure 28 Ratio of maize production to domestic utilization in ASEAN countries, 2011-2013

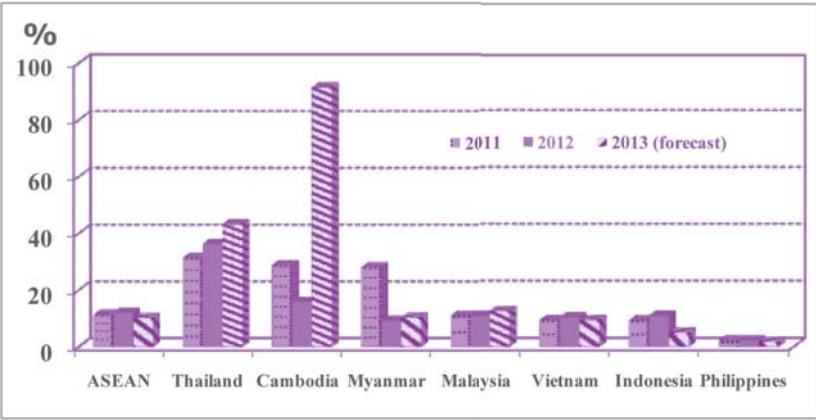


Figure 29 Ratio of maize beginning stock to domestic utilization in ASEAN countries, 2011-2013

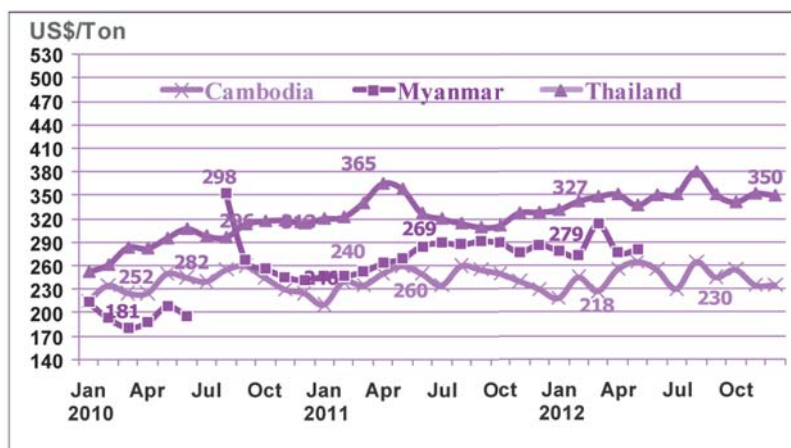


Figure 30 FOB price (US\$/Ton) of maize of selected countries in ASEAN in 2010-2012

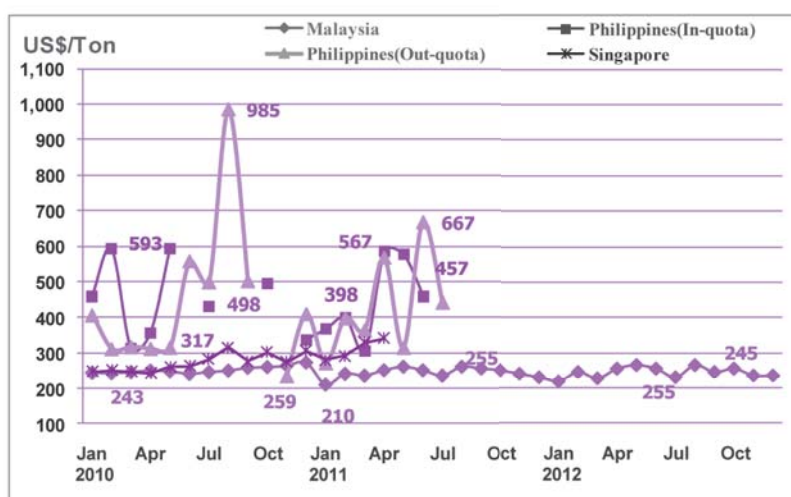


Figure 31 CIF price (US\$/Ton) of maize of selected countries in ASEAN in 2010-2012



Highlight of Sugar Outlook for 2013

- The supply of the ASEAN sugar is forecast to decrease from 28.07 million tons in 2012 to 27.84 million tons in 2013 or less than one percent due to the reduction in production and beginning stock (Table 31).
- The increase in production in Thailand, the largest sugar producing in the region and Vietnam, the second largest is not able to compensate the reduction in production in Indonesia and Cambodia (Table 32).
- The beginning stock of sugar in 2013 is forecast to reduce from 5.71 million tons to 5.64 million tons in 2013 while the production is predicted to decrease about one percent from 18.28 million tons to 18.11 million tons during the same period. The ending stock is expected to be slightly increased from 5.64 million tons to 6.14 million tons.
- The sugar export from the ASEAN is forecast to reduce from 9.08 million tons in 2012 to 8.54 million tons in 2013 while the import is expected to a slightly increase from 4.08 million tons to 4.10 million tons.
- The ratio of the production to domestic utilization (self-sufficiency ratio) in 2013 is forecast to be **138 percent in 2013, a slightly increase from 137 percent in 2012.**
- The ratio of beginning stock to domestic utilization (food security ratio) is forecast to be about **42.80 percent in 2013, a slightly increase from 42.76 percent in 2012.**

Table 31 Summary of the ASEAN sugar situation, 2012-2013

Unit: Million tons

Items	2012	2013	Change	
			Quantity	%
Supply (Million tons)	28.07	27.84	-0.23	-0.83
Beginning stock	5.71	5.64	-0.08	-1.35
Production	18.28	18.11	-0.18	-0.97
Import	4.08	4.10	0.02	0.49
Demand (Million tons)	28.07	27.84	-0.23	-0.83
Domestic utilization	13.36	13.17	-0.19	-1.43
Export	9.08	8.54	-0.54	-5.98
Ending stock	5.64	6.14	0.50	8.87
Ratio of production to domestic utilization (%)	136.88	137.52	0.64	-
Ratio of beginning stock to domestic utilization (%)	42.76	42.80	0.04	-

ASEAN Sugar Situation in 2012

Production

The year 2012 was another good year for sugarcane production similar to the year 2011 which the cane production has jumped up about 30 percent from the year 2010. The sugarcane production in 2012 was estimated at 170.83 million tons, up 5.24 million tons or 3 percent from 2011. Every country in the ASEAN, except the Philippines, the sugar production has increased (Table 32, Figure 32).

In **Thailand**, the largest sugarcane producing country in the region, the sugarcane production has increased about 3 percent from 95.95 million tons in 2011 to 98.04 million tons in 2012. The increase in production was mainly due to the expansion of planted area while the

increase in yield was less than one percent. The expansion of the planted area mostly came from the price response.

For **the Philippines**, the second largest sugarcane producing country in the ASEAN, the estimated production has reduced from 26.19 million tons in 2011 to 23.96 million tons in 2012. The decrease in production came from both the reduction in area harvested and yield. The reduction in harvested area was due to the early start of milling season and the harvesting has taken place outside the reference year. The decrease in yield was due to ratooning.

In **Vietnam**, the increase in cane production derived from the increase in both area planted and yield. The expansion of planted area attributed to the response of the price increase while the increase in yield was due to farmers use more of improved variety. Similarly for **Indonesia**, the increase in cane production came from the increase in area planted and yield. The increase in area was due to the favorable weather while the increase in yield was due to the farmers taking care of their crop better in response to the price increase.

For **Myanmar**, the increase in production was mainly due to the increase in planted area in response to the price increase while the increase in yield was very little. For **Lao PDR**, the expansion of sugarcane production came from the expansion of the area in response to the price received by the farmers and the promotion of the government and the sugar factory. The increase in yield was the result of good weather. The situation in **Cambodia** was similar to Lao PDR (Table 32-35, Figure 32-35).

Utilization and Stock

The domestic utilization of sugar in the ASEAN has increased from 12.69 million tons in 2011 to 13.21 million tons in 2012 (Table 37-38).

The beginning stock of sugar in 2012 was estimated at 5.71 million tons, an increase of 2.46 million tons compared to 3.25 million tons in 2011. The ending stock of sugar in 2012 was estimated at 5.64 million tons, a slightly decrease from 5.71 million tons in 2011.

The ratio of sugar production to domestic utilization in 2012 was estimated at 138 percent for the ASEAN. Thailand has the highest value of this ratio while Indonesia has the lowest value for sugarcane producing countries (Table 40, Figure 43).

The ratio of beginning stock to domestic utilization for the ASEAN in 2012 was estimated to be 43 percent, compared to 26 percent in 2011 indicated that sugar availability in the region has improved (Table 41, Figure 44).

Trade

In 2012, the total sugar export from the ASEAN was 9.08 million tons, up 2.23 million tons or about 33 percent, compared to 6.85 million tons in 2011. Thailand, the biggest exporting country in the ASEAN, exported 7.90 million tons or about 87 percent of the ASEAN export. The major importing countries in the ASEAN in 2012 were Malaysia and Indonesia which imported 1.80 million tons and 1.69 million tons respectively (Table 37-38).

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 42 and 43.

Prices

The FOB and CIF prices of sugar in exporting and importing countries between 2010-2012 are shown in Table 44-45. For FOB prices, the data are available only in Thailand. The annual average for raw sugar in 2012 equal to 548 US\$/ton compared to 503 US\$/ton. For white sugar the 2012 average price equal to 625 US\$/ton compared to 635 US\$/ton.

For CIF price, the data are available in Indonesia, Malaysia and Singapore. The annual average CIF price for white sugar in Indonesia in 2012 was 778 US\$/ton.

Damaged Area

The sugarcane damaged area in ASEAN in 2012 was report to be 48,449 hectares of which 19,865 caused by the drought and 17,857 hectares caused by the flood. All of the damaged area has occurred in Thailand (Table 36).

Prospects for Sugar in 2013

Production

Sugarcane production in ASEAN in 2013 is forecast to be 170.22 million tons which is about the same as in 2012. In terms of sugar, the 2013 production is forecast to be 18.11 million tons. The increase is expected in most counties, except in Cambodia, Indonesia and Myanmar. The reduction in Cambodia is due to the farmer switch to the other crops while the decrease in Indonesia is due to the unfavorable weather (Table 32, Figure 32).

Utilization and Stock

The domestic utilization of sugar in ASEAN in 2013 is forecast to be 13.12 million tons compared to 13.21 million tons in 2012 (Table 38-39).

The ratio of production to domestic utilization in 2013 is forecast to be 138 which is not change from the previous year (Table 40, Figure 43).

The beginning stock of sugar in ASEAN in 2013 is estimated at 5.64 million tons compared to 5.71 million tons in 2012. The ratio of the beginning stock to domestic utilization in 2013 is forecast to be 43 which is about the same as in 2012 (Table 41, Figure 44).

Trade

The sugar export from the ASEAN in 2013 is predicted to be 8.54 million tons, down a little from 9.08 million tons in 2012. For the import, it

is predicted that the sugar import by the ASEAN will be 4.10 million tons in 2013, increase very little from 4.08 million tons in 2012 (Table 38-39, Figure 36, 38, 39 and 41).

Table 32 Sugarcane production in ASEAN countries, 2011-2013

Unit: 1,000 Tons

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	165,589.49	170,826.52	5,237.03	3.16	170,215.02	-611.50	-0.36
Brunei	-	-	-	-	-	-	-
Cambodia	468.74	1,498.34	1,029.60	219.65	414.87	-1,083.47	-72.31
Indonesia	14,966.01	16,908.20	1,942.19	12.98	15,240.14	-1,668.06	-9.87
Lao PDR	1,222.00	1,534.50	312.50	25.57	1,800.00	265.50	17.30
Malaysia	-	-	-	-	-	-	-
Myanmar	9,249.46	9,537.43	287.98	3.11	9,445.59	-91.84	-0.96
Philippines	26,193.27	23,961.83	-2,231.44	-8.52	24,609.04	647.21	2.70
Singapore	-	-	-	-	-	-	-
Thailand	95,950.42	98,402.22	2,451.80	2.56	99,605.38	1,203.16	1.22
Vietnam	17,539.60	18,984.00	1,444.40	8.24	19,100.00	116.00	0.61

Table 33 Sugarcane planted area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	2,633.20	2,734.91	101.72	3.86	2,694.01	-40.90	-1.50
Brunei	-	-	-	-	-	-	-
Cambodia	22.61	45.86	23.24	102.79	19.01	-26.85	-58.56
Indonesia	457.62	475.87	18.25	3.99	465.80	-10.07	-2.12
Lao PDR	24.77	31.00	6.24	25.18	34.00	3.00	9.68
Malaysia	-	-	-	-	-	-	-
Myanmar	151.51	154.28	2.77	1.83	154.09	-0.19	-0.12
Philippines	415.24	412.77	-2.47	-0.60	410.80	-1.97	-0.48
Singapore	-	-	-	-	-	-	-
Thailand	1,279.25	1,318.54	39.29	3.07	1,313.32	-5.21	-0.40
Vietnam	282.20	296.60	14.40	5.10	297.00	0.40	0.13

Table 34 Sugarcane harvested area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	2,600.67	2,686.46	85.80	3.30	2,643.29	-43.17	-1.61
Brunei	-	-	-	-	-	-	-
Cambodia	22.07	45.13	23.06	104.50	19.01	-26.13	-57.89
Indonesia	447.13	465.58	18.45	4.13	434.07	-31.50	-6.77
Lao PDR	24.77	31.00	6.24	25.18	34.00	3.00	9.68
Malaysia	-	-	-	-	-	-	-
Myanmar	150.02	153.28	3.26	2.17	153.57	0.29	0.19
Philippines	415.24	412.77	-2.47	-0.60	410.80	-1.97	-0.48
Singapore	-	-	-	-	-	-	-
Thailand	1,259.24	1,282.10	22.86	1.82	1,294.85	12.74	0.99
Vietnam	282.20	296.60	14.40	5.10	297.00	0.40	0.13

Table 35 Sugarcane yield in ASEAN countries, 2011-2013

Unit: Ton/Hectare

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	63.67	63.59	-0.08	-0.13	64.40	0.81	1.27
Brunei	-	-	-	-	-	-	-
Cambodia	21.24	33.20	11.96	56.31	21.83	-11.37	-34.25
Indonesia	33.47	36.32	2.85	8.52	35.11	-1.21	-3.33
Lao PDR	49.34	49.50	0.16	0.32	52.94	3.44	6.95
Malaysia	-	-	-	-	-	-	-
Myanmar	61.66	62.22	0.56	0.91	61.51	-0.71	-1.14
Philippines	63.08	58.05	-5.03	-7.97	59.91	1.86	3.20
Singapore	-	-	-	-	-	-	-
Thailand	76.20	76.75	0.55	0.72	76.92	0.17	0.22
Vietnam	62.15	64.01	1.86	2.99	64.31	0.30	0.47

**Table 36 Sugarcane damaged area in ASEAN
by cause of damage, 2012**

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	17,857	19,865	-	-	436	10,291	48,449
Brunei	-	-	-	-	-	-	-
Cambodia	-	727	-	-	-	-	727
Indonesia	-	-	-	-	-	10,291	10,291
Lao PDR.	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	564	-	-	436	-	1,000
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	17,857	18,574	-	-	-	-	36,431
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Table 37 Sugar balance sheet of ASEAN countries, 2011

Unit: Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	3,254,847	17,688,796	4,356,286	25,299,929	12,738,278	6,849,919	5,711,732	25,299,929
Brunei	6,100	-	5,943	12,043	5,577	-	6,466	12,043
Cambodia	n.a.	46,874	n.a.	46,874	46,874	n.a.	n.a.	46,874
Indonesia	646,418	2,228,140	1,689,000	4,563,558	4,180,000	1,000	382,558	4,563,558
Lao PDR	41,548	244,400	31,970	317,918	177,893	88,701	51,324	317,918
Malaysia	204,749	-	1,797,421	2,002,170	1,518,421	279,000	204,749	2,002,170
Myanmar	-	924,946	-	924,946	917,084	-	7,862	924,946
Philippines	371,286	2,597,499	-	2,968,785	1,847,430	578,737	542,618	2,968,785
Singapore	-	-	420,000	420,000	245,000	175,000	-	420,000
Thailand	1,609,746	10,052,429	176,952	11,839,127	2,350,000	5,497,481	3,991,646	11,839,127
Vietnam	375,000	1,594,509	235,000	2,204,509	1,450,000	230,000	524,509	2,204,509

Table 38 Sugar balance sheet of ASEAN countries, 2012

Unit : Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,711,732	18,283,833	4,077,971	28,073,535	13,357,396	9,080,763	5,635,377	28,073,535
Brunei	6,466	-	5,992	12,458	5,433	-	7,025	12,458
Cambodia	n.a.	149,834	n.a.	149,834	149,834	n.a.	n.a.	149,834
Indonesia	382,558	2,601,258	1,689,000	4,672,816	4,435,168	1,000	236,648	4,672,816
Lao PDR	51,324	306,900	10,979	369,203	295,521	27,647	46,035	369,203
Malaysia ^{1/}	204,749	-	1,799,000	2,003,749	1,589,000	279,000	135,749	2,003,749
Myanmar	7,862	953,743	-	961,605	956,797	-	4,808	961,605
Philippines	542,618	2,294,737	-	2,837,355	1,765,643	553,116	518,596	2,837,355
Singapore ^{1/}	-	-	480,000	480,000	260,000	220,000	-	480,000
Thailand	3,991,646	10,251,543	13,000	14,256,189	2,400,000	7,900,000	3,956,189	14,256,189
Vietnam	524,509	1,725,818	80,000	2,330,327	1,500,000	100,000	730,327	2,330,327

Table 39 Sugar balance sheet of ASEAN countries, 2013

Unit : Tons

Country	Supply				Demand			
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	5,635,377	18,106,481	4,097,705	27,839,563	13,165,988	8,538,273	6,135,302	27,839,563
Brunel ^{1/}	7,025	-	6,000	13,025	5,470	-	7,555	13,025
Cambodia	n.a.	41,487	n.a.	41,487	41,487	n.a.	n.a.	41,487
Indonesia	236,648	2,344,695	1,688,705	4,270,048	4,179,120	1,000	89,928	4,270,048
Lao PDR	46,035	360,000	10,000	416,035	314,835	40,000	61,200	416,035
Malaysia ^{1/}	135,749	-	1,870,000	2,005,749	1,620,000	200,000	185,749	2,005,749
Myanmar	4,808	944,559	-	949,367	944,620	-	4,747	949,367
Philippines	518,596	2,302,488	-	2,821,084	1,755,518	549,945	515,621	2,821,084
Singapore ^{1/}	-	-	480,000	480,000	260,000	220,000	-	480,000
Thailand	3,956,189	10,376,888	13,000	14,346,077	2,544,938	7,407,328	4,393,811	14,346,077
Vietnam	730,327	1,736,364	30,000	2,496,691	1,500,000	120,000	876,691	2,496,691

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

Table 40 Ratio of sugar production to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	17,688,796	12,738,278	138.86	18,283,833	13,357,396	136.88	18,106,481	13,165,988	137.52
Brunei	-	5,577	-	-	5,433	-	-	5,470	-
Cambodia	46,874	46,874	-	149,834	149,834	-	41,487	41,487	-
Indonesia	2,228,140	4,180,000	53.30	2,601,258	4,435,168	58.65	2,344,695	4,179,120	56.10
Lao PDR	244,400	177,893	137.39	306,900	295,521	103.85	360,000	314,835	114.35
Malaysia	-	1,518,421	-	-	1,589,000	-	-	1,620,000	-
Myanmar	924,946	917,084	100.86	953,743	956,797	99.68	944,559	944,620	99.99
Philippines	2,597,499	1,847,430	140.60	2,294,737	1,765,643	129.97	2,302,488	1,755,518	131.16
Singapore	-	245,000	-	-	260,000	-	-	260,000	-
Thailand	10,052,429	2,350,000	427.76	10,251,543	2,400,000	427.15	10,376,888	2,544,938	407.75
Vietnam	1,594,509	1,450,000	109.97	1,725,818	1,500,000	115.05	1,736,364	1,500,000	115.76

Table 41 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	3,254,847	12,738,278	25.55	5,711,732	13,357,396	42.76	5,635,377	13,165,988	42.80
Brunei	6,100	5,577	109.38	6,466	5,433	119.01	7,025	5,470	128.43
Cambodia	n.a.	46,874	n.a.	n.a.	149,834	n.a.	n.a.	41,487	-
Indonesia	646,418	4,180,000	15.46	382,558	4,435,168	8.63	236,648	4,179,120	5.66
Lao PDR	41,548	177,893	23.36	51,324	295,521	17.37	46,035	314,835	14.62
Malaysia	204,749	1,518,421	13.48	204,749	1,589,000	12.89	135,749	1,620,000	8.38
Myanmar	-	917,084	-	7,862	956,797	0.82	4,808	944,620	0.51
Philippines	371,286	1,847,430	20.10	542,618	1,765,643	30.73	518,596	1,755,518	29.54
Singapore	-	245,000	-	-	260,000	-	-	260,000	-
Thailand	1,609,746	2,350,000	68.50	3,991,646	2,400,000	166.32	3,956,189	2,544,938	155.45
Vietnam	375,000	1,450,000	25.86	524,509	1,500,000	34.97	730,327	1,500,000	48.69

Table 42 Quantity and Value of Sugar Export by Countries of Destination in 2012 Quantity: Tons Values: US\$

Exporting Country	Country of Destination											
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia									142	54,980	11,555	1,273,451
Lao PDR												
Malaysia			8,140	5,659,065	50	40,880					550	413,559
Myanmar												
Philippines					6,000	3,330,000						
Singapore												
Thailand	8,622	6,552,616	474,303	285,557,493	1,506,449	826,437,812	81,454	54,290,000	437,244	255,873,607	41,220	35,362,882
Vietnam												55,514,348

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	34	48,786	108	277,029	12,917	1,714,578	24,756	3,368,824		195,770	22,111,318		220,526	25,480,142
Lao PDR														
Malaysia	142	149,633			2,575	165,720	18,433	10,899,831		37,329	29,048,671		55,762	39,948,502
Myanmar														
Philippines					6,853	3,640,610	12,853	6,970,610		160,579	87,196,730		173,432	94,167,340
Singapore														
Thailand	125,060	83,788,683			337,095	160,971,114	3,094,051	1,764,348,555		4,341,913	2,200,615,345		7,435,964	3,964,963,900
Vietnam														

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

Table 43 Quantity and Value of Sugar Import by Countries in 2012

Quantity: Tons Values: US\$

Exporting Country	Country of Destination											
	Brunei		Cambodia		Indonesia		Lao PDR		Malaysia		Myanmar	
	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values	Quantity	Values
Brunei												
Cambodia												
Indonesia									4,384	3,187,058		
Lao PDR												
Malaysia					8	2,616					4	9,818
Myanmar												
Philippines												
Singapore												
Thailand					5,208	16,432,244	11,882	1,652,682	1,024	3,941,301	35	15,355
Vietnam											1,978	7,809,269

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			5,801	n.a.			5,801		n.a.				5,801	n.a.
Cambodia														
Indonesia	1,617	1,705,012	159,810	100,232,080			165,811	105,124,150		124,326	41,894,283		290,137	147,018,433
Lao PDR														
Malaysia	4	5,492	24,023	13,993,448			24,039	14,011,374		284,636	173,540,980		308,675	187,552,354
Myanmar														
Philippines														
Singapore														
Thailand	274.29	993,340					23,263	45,058,115		144,881	100,628,917		168,144	145,687,032
Vietnam														

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

Table 44 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	451	549	533	604	517						551
Thailand	Raw Sugar	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
	White Sugar	2012	589	564	554	554	530	515	533	519	543	558	560	562	548
		2010	533	524	562	528	515	524	511	552	559	549	649	656	555
	White Sugar	2011	598	593	617	612	632	611	646	660	670	651	677	652	635
		2012	630	658	649	632	623	612	630	616	617	610	610	608	625

Table 45 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	2010	578	685	768	637	578	449	578	520	476	549	540	676	586
		2011	825	915	946	965	900	802	815	878	813	931	981	720	874
		2012	912	915	806	795	673	740	650	735					778
Singapore	Raw Sugar	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 sucroses	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	950	567	602	590	588	621	694	611	595				646

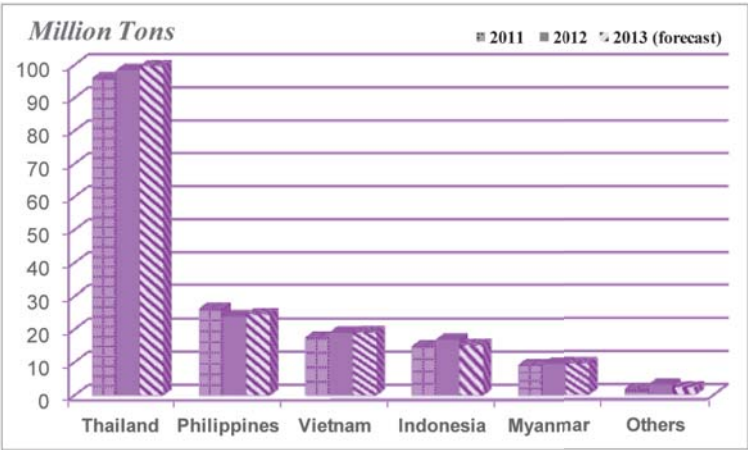


Figure 32 Sugarcane production of selected countries in ASEAN, 2011-2013

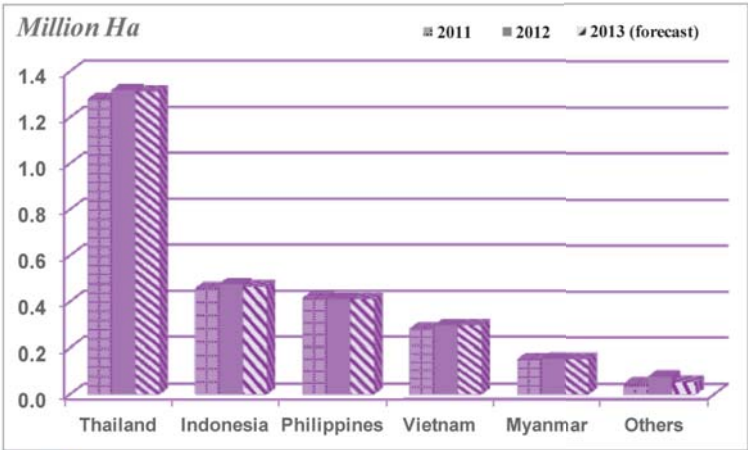


Figure 33 Sugarcane planted area of selected countries in ASEAN, 2011-2013

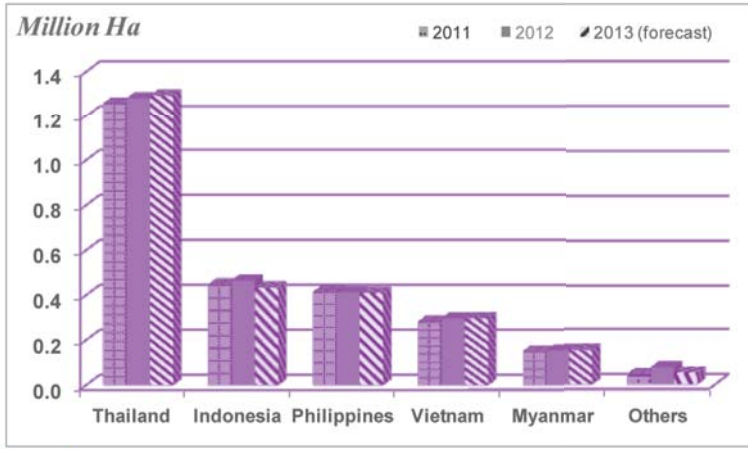


Figure 34 Sugarcane harvested area of selected countries in ASEAN, 2011-2013

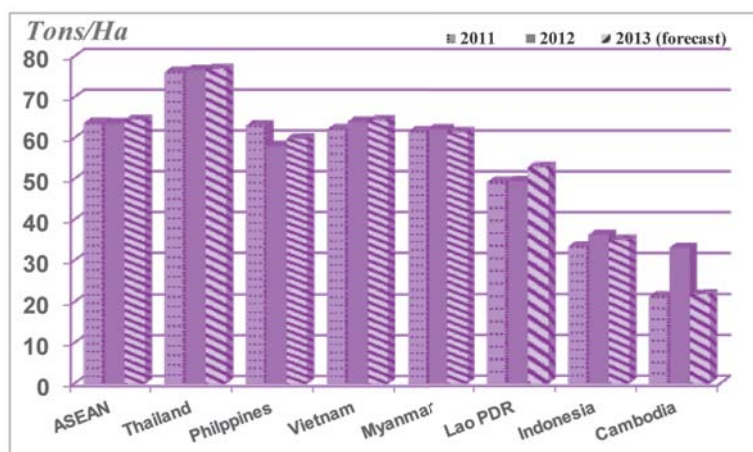


Figure 35 Sugarcane yield of countries in ASEAN, 2011-2013

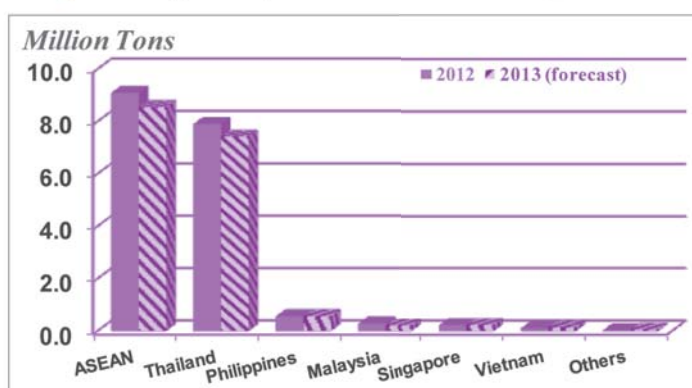


Figure 36 Amount of Sugar export (million tons) of selected countries in ASEAN in 2012-2013

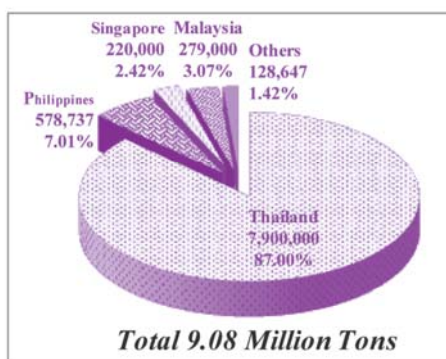


Figure 37 Share of sugar export (tons) among ASEAN countries, 2012

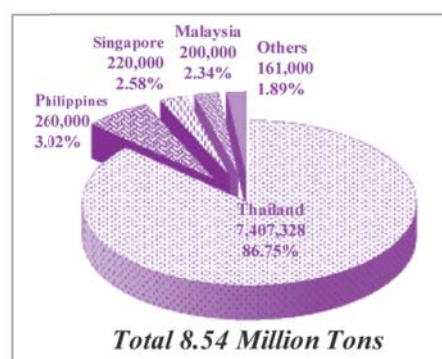


Figure 38 Share of sugar export (tons) among ASEAN countries, 2013

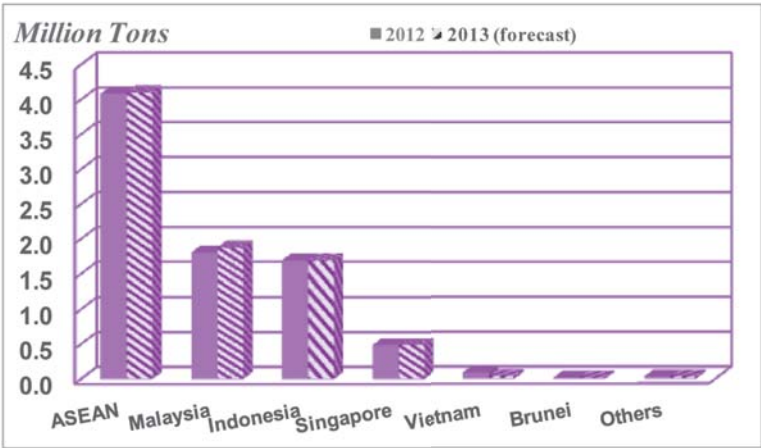


Figure 39 Amount of sugar import (million tons) by selected countries in ASEAN in 2012-2013

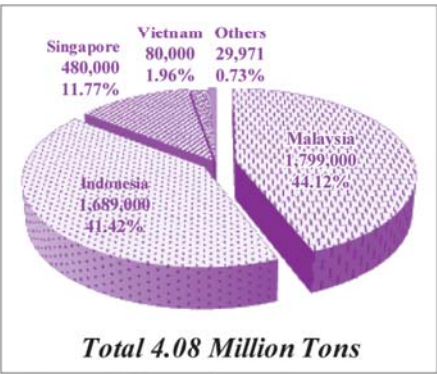


Figure 40 Share of sugar import (ton) among ASEAN countries, 2012

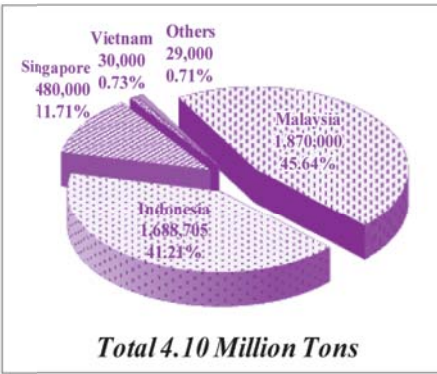


Figure 41 Share of sugar import (ton) among ASEAN countries, 2013

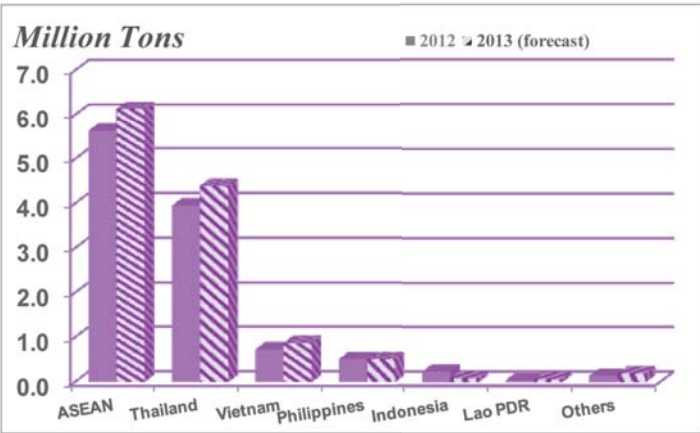


Figure 42 Amount of ending stock of sugar in ASEAN countries in 2012-2013

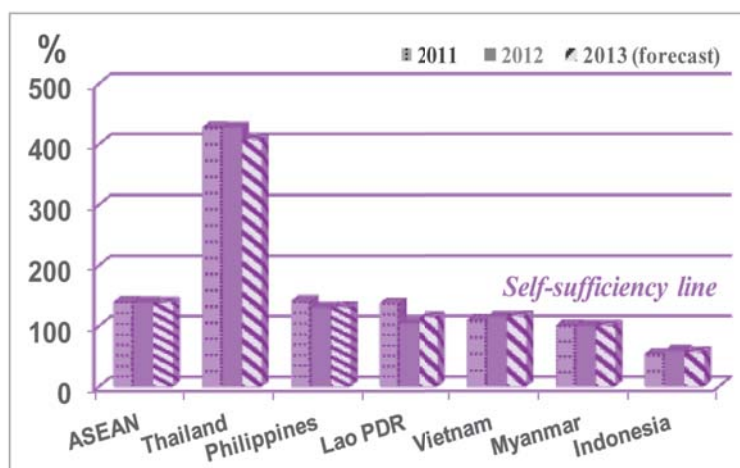


Figure 43 Ratio of sugar production to domestic utilization in ASEAN countries, 2011-2013

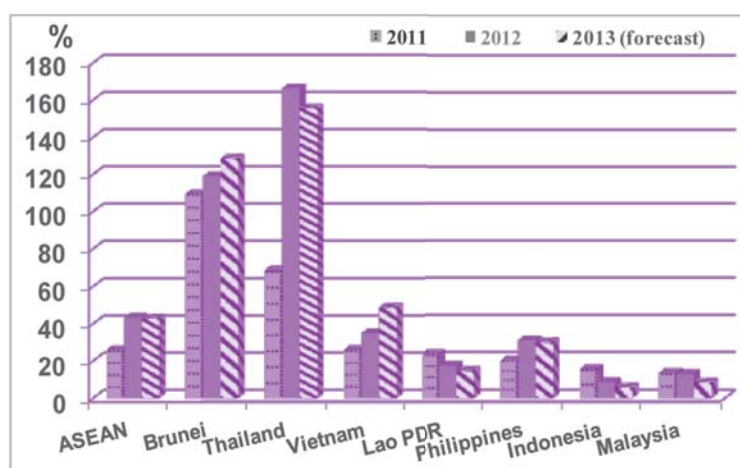


Figure 44 Ratio of sugar beginning stock to domestic utilization in ASEAN countries, 2011-2013

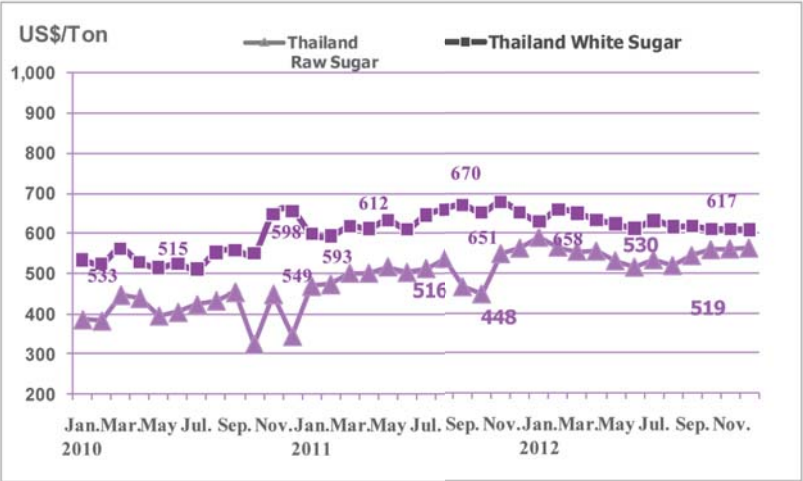


Figure 45 FOB price (US\$/Ton) of white sugar of selected countries in ASEAN in 2010-2012

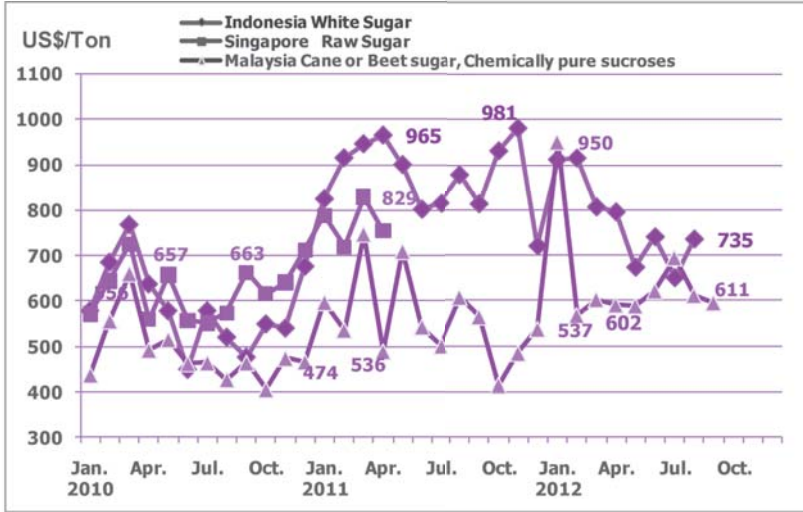


Figure 46 CIF price (US\$/Ton) of white sugar of selected countries in ASEAN in 2010-2012



Highlights of Soybean Outlook for 2013

- Soybean supply in the ASEAN is forecast to increase from 6.77 million tons in 2012 to 7.01 million tons in 2013 which is about 4 percent increase (Table 46). The increase came from the increase in production and import. The production has increased about 5 percent from 1.44 million tons to 1.52 million tons (Table 47).
- The beginning stock in 2013 is estimated to be 0.14 million tons, down 0.06 million tons compared to 0.20 million tons in 2012.
- The export of soybean from the ASEAN is expected to be slightly decrease from 0.11 million tons in 2012 to 0.10 million tons in 2013.
- The import of soybean by the ASEAN is forecast to increase about 4 percent from 5.13 million tons in 2012 to 5.36 million tons in 2013.
- The production to domestic utilization ratio in 2013 is forecast to be 23 percent, a slightly increase from 2012. This indicates that the soybean production in The ASEAN is not sufficient for the demand within the ASEAN.
- The beginning stock to domestic utilization ratio is expected to be 2.0 percent compared to 3.0 percent in 2012. This is very low value compared to the optimum value of 20 percent.

Table 46 Summary of the ASEAN soybean situation, 2012-2013

Unit: Million tons

Items	2012	2013	Change	
			Quantity	%
Supply (Million tons)	6.77	7.01	0.24	3.55
Beginning stock	0.20	0.14	-0.06	-30.00
Production	1.44	1.52	0.08	5.56
Import	5.13	5.36	0.23	4.48
Demand (Million tons)	6.77	7.01	0.24	3.55
Domestic utilization	6.53	6.59	0.06	0.92
Export	0.11	0.10	-0.01	-9.09
Ending stock	0.14	0.32	0.18	128.57
Ratio of production to domestic utilization (%)	22.07	23.05	0.98	-
Ratio of beginning stock to domestic utilization (%)	3.04	2.06	-0.98	-

ASEAN Soybean Situation 2012

Production

Soybean production in the ASEAN in 2012 was estimated at 1.44 million tons, a decrease of 0.19 million tons or 12 percent from 1.63 million tons in 2011. The decrease attributed to the reduction in area planted while the yield was relatively the same (Table 47-50, Figure 47-50).

The contraction in production had occurred in almost of the major soybean producing country in the region. For Indonesia, the largest producing countries the reduction in planted area was due to the competition with other crops and unfavorable weather during the third crop. For Myanmar, the reduction in price was cited as a cause of the reduction in the planted area. In Thailand, the price received by the farmers was the major cause of the reduction in planted area. The factory that causes a reduction in Vietnam was the price of competing

crops and the unfavorable weather. Lao PDR and the Philippines producing very small amount of soybeans which 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. The domestic utilization of soybean in the ASEAN in 2012 was 6.53 million tons, a decrease of 0.24 million tons or about 4 percent from 6.77 million tons in 2011 (Table 49). In 2012 the beginning stock was estimated at 0.20 million tons, a reduction of about 0.03 million tons or about 12 percent from 0.22 million tons in 2011. Thailand kept the most of soybean stock in the region (Table 52-53).

The ratio of production to domestic utilization within the ASEAN in 2012 was 22 percent compared to 24 percent in 2011 indicated that, aggregately, the ASEAN is very much rely on the import. However, for Cambodia, Lao PDR and Myanmar, have a ratio equal or above 100 percent indicated that these countries are self-sufficient in soybeans. Thailand and Vietnam have the ratio equal to 5.0 and 12.6 percent respectively which is very low (Table 55, Figure 58). The ratio of the beginning stock to the domestic utilization for the ASEAN in 2012 estimated to be 3 percent. Most countries, except Cambodia and Lao PDR, have very low ratio (Table 56, Figure 59).

Trade

The 2012 soybeans exported from The ASEAN was 0.11 million tons, a decrease of 0.02 million tons from 0.13 million tons in 2011. Cambodia is the major exporting country in the ASEAN which exported about 0.09 million tons respectively or about 86 percent of the total export from the ASEAN. For other countries, there was a re-export (Table 55-56, Figure 51-52).

For the import, the total soybean import in 2012 was reported to be 5.13 million tons, a decrease of 0.11 million tons from 5.24 million tons in 2011. Thailand, Indonesia, Vietnam and Malaysia are the major importing countries in the region (Table 55-56, Figure 54-55).

The quantity and value of soybean export by countries of destination and the quantity and value of soybean import by countries of origin are given in Table 57-58.

Prices

The FOB prices of Cambodia and Indonesia between 2010-2012 are shown in Table 59. The CIF prices of Indonesia, Malaysia, Myanmar, the Philippines, Singapore and Thailand are given in Table 60.

Damaged Area

The damaged area of soybean in the ASEAN in 2012 was reported to be 2,288 hectares. The major cause of damage was the drought and affected Thailand the most (Table 51).

Prospects for Soybean in 2013

Production

Soybean production in the ASEAN in 2013 is forecast to be 1.52 million tons, compared to 1.44 million tons in 2012, an increase of about 5 percent. In general, there is a negative trend in soybean production in the ASEAN due to the low return relative to other crops and also very difficult to obtain quality seed because it cannot be kept in the normal temperature across the season. The most increase is predicted in Indonesia. Cambodia and Thailand are predicted to have less production (Table 47-50, Figure 47-50).

Utilization and Stock

The domestic utilization of soybeans in the ASEAN is forecast to be 6.59 million tons in 2013, an increase of about 0.06 million tons or about 1 percent from 6.53 million tons in 2012 (Table 53-54). The beginning stock in 2013 is estimated at 0.14 million tons, down 0.06 million tons or 30 percent from the previous year. The production to domestic utilization ratio is predicted to be about 23 percent which is about 1 percent different from 22 percent in 2012 (Table 55, Figure 58). For the beginning stock to the domestic utilization ratio, it is forecast to be about 2 percent which is very lower level and low than 3 percent in 2012 (Table 56, Figure 59).

Trade

The export of soybeans from the ASEAN is projected to be a slightly decrease from 0.11 million tons in 2012 to 0.10 in 2013. However, the total export is very small compared to the total import by the ASEAN. The total import by the ASEAN in 2013 is projected to be 5.36 million tons, a slightly increase from 5.13 million tons in 2012 (Table 53-54, Figure 51, 53, 54 and 56).

Table 47 Soybean production in ASEAN countries, 2011-2013

Unit: 1,000 Tons

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	1,628.34	1,440.54	-187.80	-11.53	1,518.91	78.37	5.44
Brunei	-	-	-	-	-	-	-
Cambodia	114.60	119.81	5.21	4.55	117.50	-2.31	-1.93
Indonesia	851.29	783.16	-68.13	-8.00	858.48	75.32	9.62
Lao PDR	13.82	15.36	1.54	11.11	17.08	1.73	11.23
Malaysia	-	-	-	-	-	-	-
Myanmar	254.52	236.91	-17.61	-6.92	237.47	0.56	0.23
Philippines	0.69	0.68	-0.01	0.00	0.67	-0.01	-0.89
Singapore	-	-	-	-	-	-	-
Thailand	126.52	107.02	-19.50	-15.41	104.91	-2.11	-1.97
Vietnam	266.90	177.60	-89.30	-33.46	182.80	5.20	2.93

Table 48 Soybean planted area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	1,131.76	999.48	-132.28	-11.69	1,049.65	50.17	5.02
Brunei	-	-	-	-	-	-	-
Cambodia	70.58	71.67	1.09	1.54	70.50	-1.17	-1.63
Indonesia	622.25	570.96	-51.30	-8.24	623.03	52.07	9.12
Lao PDR	9.15	9.70	0.56	6.07	10.50	0.80	8.25
Malaysia	-	-	-	-	-	-	-
Myanmar	169.00	157.50	-11.50	-6.81	155.77	-1.73	-1.10
Philippines	0.52	0.50	-0.01	-2.71	0.50	0.00	0.00
Singapore	-	-	-	-	-	-	-
Thailand	79.16	66.26	-12.90	-16.30	64.36	-1.90	-2.87
Vietnam	181.10	122.90	-58.20	-32.14	125.00	2.10	1.71

Table 49 Soybean harvested area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	1,128.13	997.19	-130.94	-11.61	1,042.51	45.31	4.54
Brunei	-	-	-	-	-	-	-
Cambodia	69.20	71.31	2.11	3.05	69.00	-2.31	-3.23
Indonesia	622.25	570.50	-51.76	-8.32	617.85	47.36	8.30
Lao PDR	9.15	9.70	0.56	6.07	10.50	0.80	8.25
Malaysia	-	-	-	-	-	-	-
Myanmar	169.00	157.50	-11.50	-6.81	155.77	-1.73	-1.10
Philippines	0.52	0.50	-0.01	-2.71	0.50	-0.01	-1.59
Singapore	-	-	-	-	-	-	-
Thailand	76.92	64.79	-12.13	-15.76	63.89	-0.90	-1.40
Vietnam	181.10	122.90	-58.20	-32.14	125.00	2.10	1.71

Note: Vietnam reported only planted area.

Table 50 Soybean yield in ASEAN countries, 2011-2013

Unit: Ton/Hectare

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	1.443	1.445	0.00	0.08	1.457	0.01	0.86
Brunei	-	-	-	-	-	-	-
Cambodia	1.656	1.680	0.02	1.46	1.703	0.02	1.35
Indonesia	1.368	1.373	0.00	0.34	1.389	0.02	1.22
Lao PDR	1.511	1.583	0.07	4.75	1.627	0.04	2.76
Malaysia	-	-	-	-	-	-	-
Myanmar	1.506	1.504	0.00	-0.12	1.524	0.02	1.35
Philippines	1.325	1.344	0.02	1.43	1.354	0.01	0.71
Singapore	-	-	-	-	-	-	-
Thailand	1.645	1.652	0.01	0.42	1.642	-0.01	-0.59
Vietnam	1.474	1.445	-0.03	-1.95	1.462	0.02	1.20

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

**Table 51 Soybean damaged area in ASEAN
by cause of damage, 2012**

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	-	1,827	461	-	-	-	2,288
Brunei	-	-	-	-	-	-	-
Cambodia	-	365	-	-	-	-	365
Indonesia	-	-	461	-	-	-	461
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	-	-
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	-	1,462	-	-	-	-	1,462
Vietnam	-	-	-	-	-	-	-

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

Table 54 Soybean balance sheet of ASEAN countries, 2013

Unit: Tons

Country	Supply			Total	Demand			
	Beginning Stock	Production	Imports		Domestic Utilization	Exports	Ending stock	Total
ASEAN	136,015	1,518,909	5,359,296	7,014,220	6,589,154	104,960	320,106	7,014,220
Brunei	n.a.	-	691	691	691	-	n.a.	691
Cambodia	7,293	117,500	-	124,793	26,814	93,324	4,655	124,793
Indonesia	-	858,480	1,521,616	2,380,096	2,195,651	9,155	175,290	2,380,096
Lao PDR	3,947	17,080	-	21,027	16,055	-	4,972	21,027
Malaysia1/	-	-	400,000	400,000	399,800	200	-	400,000
Myanmar	-	237,468	-	237,468	237,468	-	-	237,468
Philippines1/	n.a.	670	100,000	100,670	100,670	n.a.	n.a.	100,670
Singapore	-	-	20,000	20,000	20,000	-	-	20,000
Thailand	116,275	104,911	2,066,989	2,288,175	2,162,005	2,281	123,889	2,288,175
Vietnam	8,500	182,800	1,250,000	1,441,300	1,430,000	-	11,300	1,441,300

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

Table 55 Ratio of soybean production to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	1,628,335	6,770,311	24.05	1,440,538	6,526,605	22.07	1,518,909	6,589,154	23.05
Brunei	-	621	-	-	671	-	-	691	-
Cambodia	114,603	24,066	476.20	119,813	26,680	449.07	117,500	26,814	438.20
Indonesia	851,286	2,296,000	37.08	783,158	2,167,259	36.14	858,480	2,195,651	39.10
Lao PDR	13,820	12,024	114.94	15,355	14,127	108.69	17,080	16,055	106.38
Malaysia	-	608,658	-	-	440,280	-	-	399,800	-
Myanmar	254,520	254,520	100.00	236,912	236,912	100.00	237,468	237,468	100.00
Philippines	685	52,422	1.31	676	100,676	0.67	670	100,670	0.67
Singapore	-	20,000	-	-	20,000	-	-	20,000	-
Thailand	126,521	2,142,000	5.91	107,024	2,110,000	5.07	104,911	2,162,005	4.85
Vietnam	266,900	1,360,000	19.63	177,600	1,410,000	12.60	182,800	1,430,000	12.78

Table 56 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	224,653	6,770,311	3.32	198,377	6,526,605	3.04	136,015	6,589,154	2.06
Brunei	n.a.	621	-	n.a.	671	-	n.a.	691	-
Cambodia	8,165	24,066	33.93	7,020	26,680	26.31	7,293	26,814	27.20
Indonesia	27,779	2,296,000	1.21	17,804	2,167,259	0.82	-	2,195,651	-
Lao PDR	1,106	12,024	9.20	2,902	14,127	20.54	3,947	16,055	24.58
Malaysia	-	608,658	-	-	440,280	-	-	399,800	-
Myanmar	-	254,520	-	-	236,912	-	-	237,468	-
Philippines	-	52,422	-	n.a.	100,676	-	n.a.	100,670	-
Singapore	-	20,000	-	-	20,000	-	-	20,000	-
Thailand	183,603	2,142,000	8.57	159,751	2,110,000	7.57	116,275	2,162,005	5.38
Vietnam	4,000	1,360,000	0.29	10,900	1,410,000	0.77	8,500	1,430,000	0.59

Table 57 Quantity and Value of Soybean Export by Countries of Destination in 2012 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	218	354,278							533	767,049	79	122,526	159	186,711
Lao PDR														
Malaysia														
Myanmar														
Philippines														
Singapore					285	180,000			163	132,000				
Thailand			81	32,095	100	115,632	600.91	410,247	47.79	28,906	0.22	1,267		
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	Quantity	Values	Quantity	Values										
Brunei																
Cambodia																
Indonesia	295	440,489			15	23,758	1,298	1,894,811	27,127	27,290,885	28,425	29,185,696	183	45,178		
Lao PDR													236	163,494		
Malaysia																
Myanmar																
Philippines																
Singapore					40	36,000	488	348,000	45	54,000	533	402,000				
Thailand	13	23,691			345.6	279,954	1,188	891,792	507	506,191	1,695	1,397,983				
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 58 Quantity and Value of Soybean Import by Countries of Origin in 2012

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									52,787	44,749,762				
Lao PDR														
Malaysia														
Myanmar														
Philippines									19	4,760				
Singapore									656	508,000				
Thailand			6,975	3,495,576							54	17,925		
Vietnam				171,924				50,000		11,327				

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	1,303	1,844,233	284	270,970			54,374	46,864,965		1,324,815	768,700,073		1,379,189	815,565,038	
Lao PDR															
Malaysia										440,516	256,607,043		440,516	256,607,043	
Myanmar															
Philippines							19.0	4,760		40,881	17,556,523		40,900	17,561,283	
Singapore							656	508,000		16,402	11,250,000		17,058	11,758,000	
Thailand							7,029	3,513,501		1,634,004	956,566,791		1,641,033	960,080,292	
Vietnam		41,286		413,783		688,320		1,376,640			404,346,706			405,723,346	

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

Table 59 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	520	525	530	510	480	465	470	511
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	1,476	1,167	1,248	1,308
		2012	965	1,214	1,347	1,172	1,384	1,251	1,211	1,059					1,200

Table 60 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
Indonesia		2011	553	572	666	627	621	653	632	615	657	605	635	567	617
		2012	559	537	551	562	609	620	644	653					592
Malaysia		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	539	514	555	561	580	606	617	643	715				592
Myanmar		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	505	457	602	587	589	610	566	575	578	565	571	503	559
		2012	211	535	555	587	561	609	616						525
Singapore		2010	649	649	656	658	659	653	644	667	643	666	693	715	663
		2011	711	721	760	746									735
Thailand		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	522	520	522	609	615	609	553	525	540	551

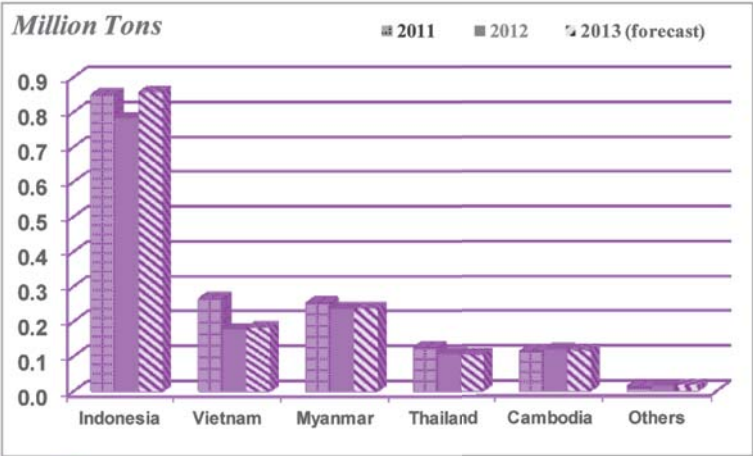


Figure 47 Soybean production of selected countries in ASEAN, 2011-2013

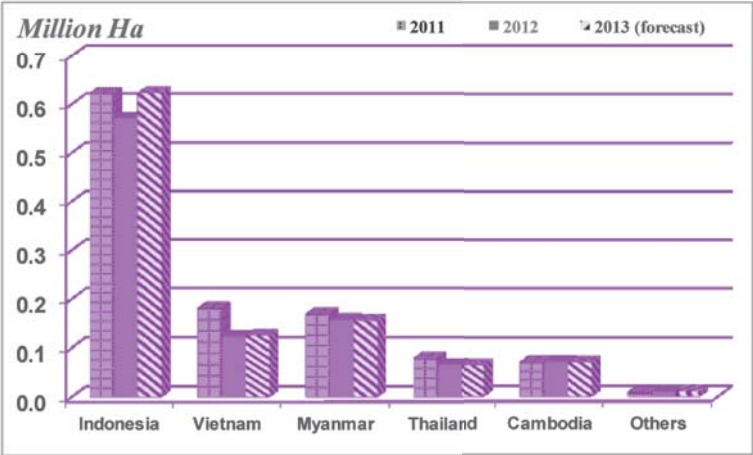


Figure 48 Soybean planted area of selected countries in ASEAN, 2011-2013

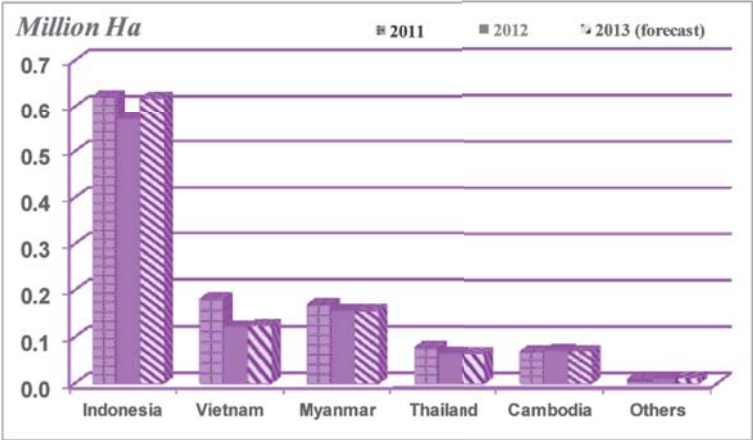


Figure 49 Soybean harvested area of selected countries in ASEAN, 2011-2013

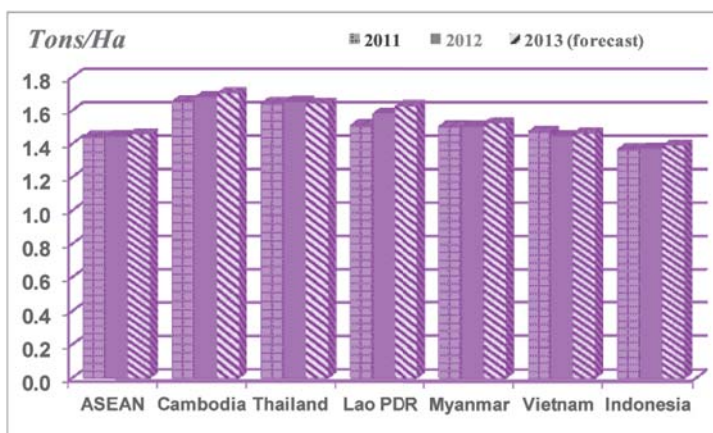


Figure 50 Soybean yield of countries in ASEAN, 2011-2013

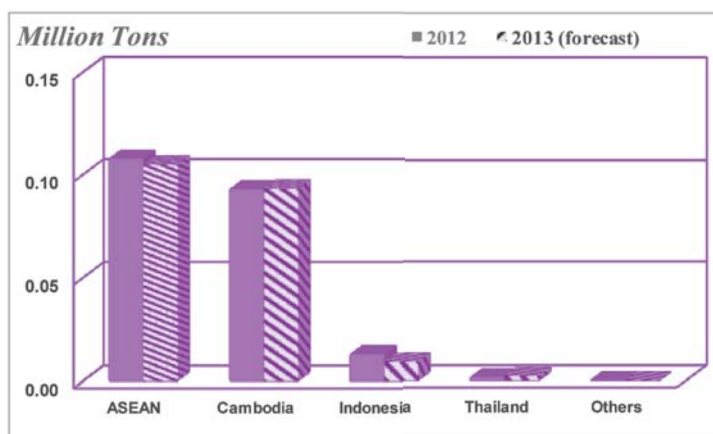


Figure 51 Amount of Soybean export (million tons) of selected countries in ASEAN in 2012-2013

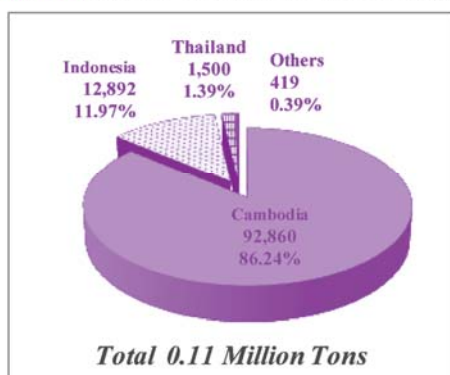


Figure 52 Share of soybean export (ton) among ASEAN countries, 2012

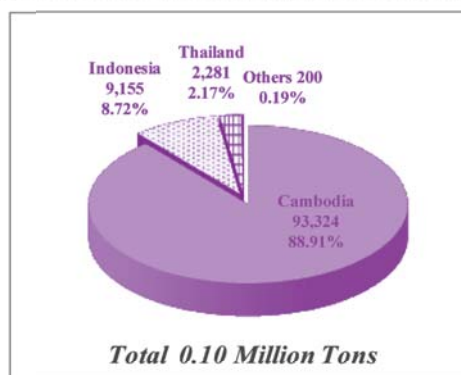


Figure 53 Share of soybean export (ton) among ASEAN countries, 2013

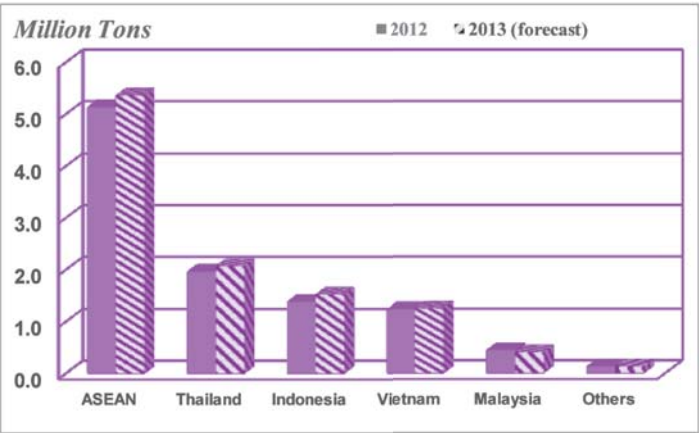


Figure 54 Amount of soybean import (million tons) by selected countries in ASEAN in 2012-2013

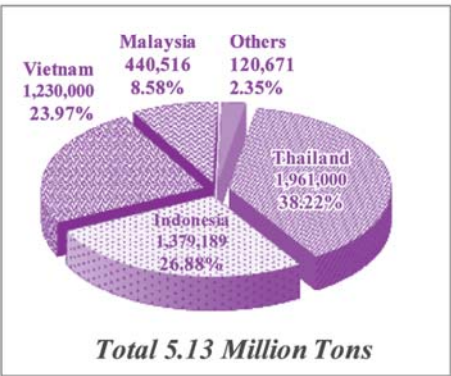


Figure 55 Share of soybean import (ton) among ASEAN countries, 2012

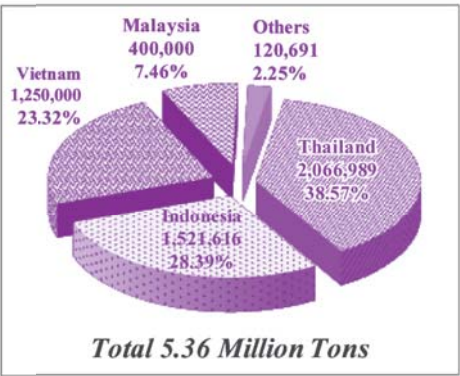


Figure 56 Share of soybean import (ton) among ASEAN countries, 2013

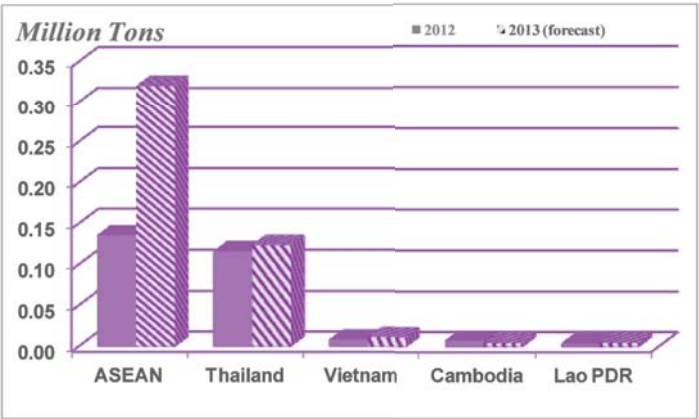


Figure 57 Amount of ending stock of soybean in ASEAN countries in 2012-2013

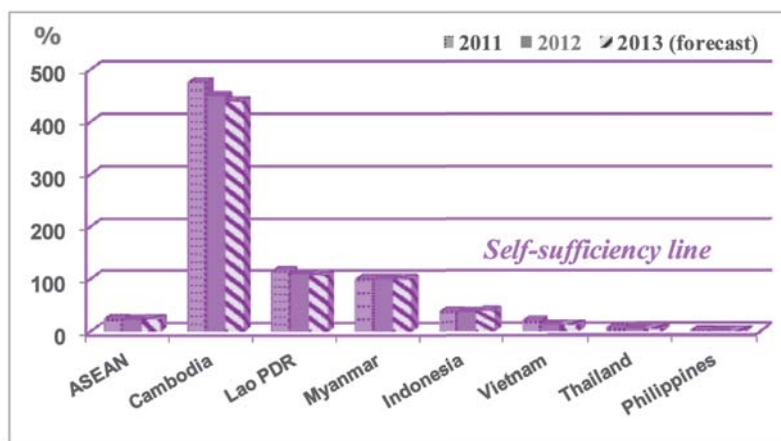


Figure 58 Ratio of soybean production to domestic utilization in ASEAN countries, 2011-2013

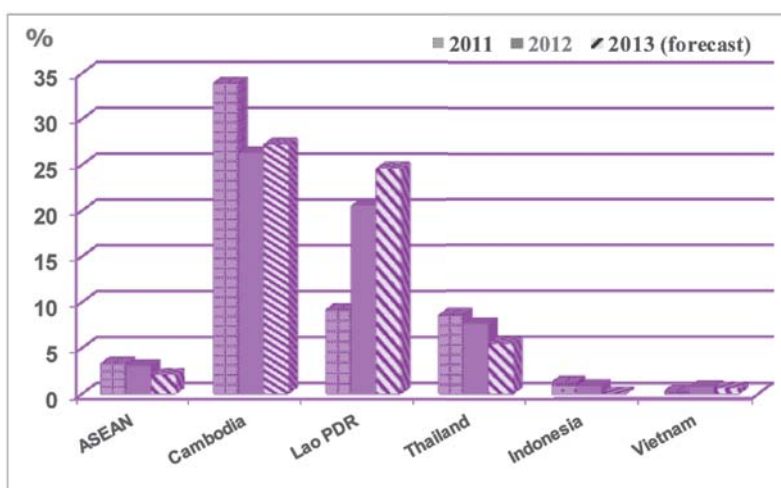


Figure 59 Ratio of soybean beginning stock to domestic utilization in ASEAN countries, 2011-2013

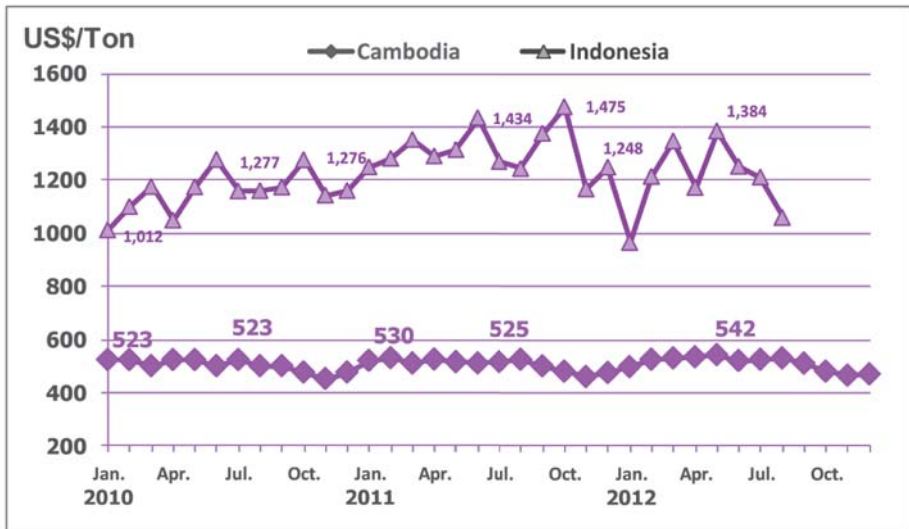


Figure 60 FOB price (US\$/Ton) of soybean of selected countries in ASEAN in 2010-2012

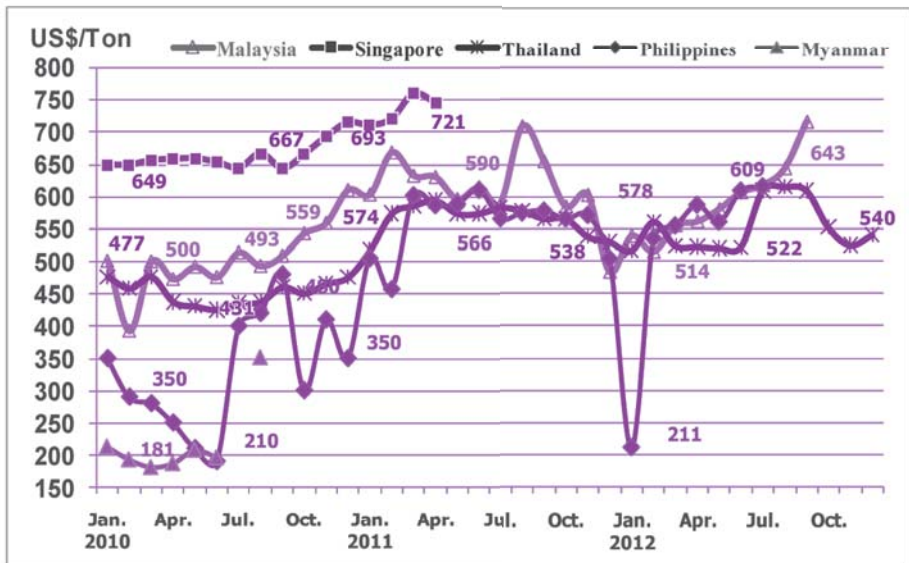


Figure 61 CIF price (US\$/Ton) of soybean of selected countries in ASEAN in 2010-2012



Highlights of Cassava Outlook for 2013

- The supply of cassava in ASEAN is forecast to increase from 77.05 million tons in 2012 to 80.46 million tons in 2013, an increase of 3.4 million tons or about 4 percent. The increase in supply derived solely from the increase in production while the beginning stock and the import is forecast to decrease (Table 61).
- The increase in production attributed to the increase in both harvested area and yield. The factors contributing to the increase, in most countries, are the price increase and the weather condition (Table 62).
- The export of cassava is expected to increase from 27.13 million tons in 2012 to 28.97 million tons in 2013, an increase of about 1.84 million tons or about 7 percent.
- The import of cassava is forecast to decrease from 1.78 million tons to 1.49 million tons during the same period.
- The beginning stock of cassava in 2013 is estimated at 2.77 million tons, down from 4.93 million tons in 2012 due to the reduction in stock in Indonesia. The ending stock in 2013 is forecast to be 2.47 million tons, down from 2.77 million tons in 2012.
- The ratio of production to domestic utilization in 2013 is forecast to be 155 percent, compared to 149 percent in 2012. The ratio of beginning stock to domestic utilization in 2013 is forecast to be 5.7 percent down from 10.5 percent in 2012 indicated that it is very risky in shortage of cassava supply in certain month even though total supply is sufficient.

Table 61 Summary of the ASEAN cassava situation, 2012-2013

Unit: Million tons

Items	2012	2013	Change	
			Quantity	%
Supply (Million tons)	77.05	80.46	3.40	4.42
Beginning stock	4.93	2.77	-2.16	-43.80
Production	70.34	76.20	5.86	8.32
Import	1.78	1.49	-0.30	-16.56
Demand (Million tons)	77.05	80.46	3.40	4.42
Domestic utilization	47.15	49.01	1.86	3.94
Export	27.13	28.97	1.84	6.79
Ending stock	2.77	2.47	-0.30	-10.69
Ratio of production to domestic utilization (%)	149.19	155.48	6.29	-
Ratio of beginning stock to domestic utilization (%)	10.45	5.65	-4.80	-

ASEAN Cassava situation in 2012

Production

The estimated cassava (root fresh) in ASEAN in 2012 (Crop year 2011/12) was 70.34 million tons, an increase of 2.86 million tons or about 4 percent, compared to 2011. Even though the regional production has increased, there are three countries, namely, Cambodia, Indonesia and Vietnam, the production has decreased. Thailand and Indonesia are the only two major cassava producing countries in the region (Table 62-65, Figure 62-65).

The estimated cassava production in 2012 in Indonesia, the second largest cassava producing country, has decreased about 6 percent due to the decrease in harvested area as a result of price decrease.

For Thailand, the increase in production attributed to the increase in both harvested area and yield in response to the price increase as a result of the government mortgage scheme.

In Vietnam, the decrease in production came from the reduction in both harvested area and yield.

Utilization and Stock

Cassava root in ASEAN, in general, can be used for human food, animal feed and making ethanol. The domestic utilization of cassava for all purpose in ASEAN in 2012 was estimated at 47.15 million tons, an increase of 2.89 million tons, compared to 44.26 million tons in 2011 (Table 67-68).

The beginning stock in 2012 was estimated at 4.93 million tons, a significant decrease from 8.00 million tons in 2011. The ending stock of cassava in 2012 is estimated to be 2.77 million tons down 2.16 million tons, compared to 2011.

The ratio of the production to the domestic utilization in 2012 was estimated to be 149 percent, compared to 152 percent in 2011, indicated that the cassava production in the ASEAN is sufficient for the demand within the ASEAN (Table 70, Figure 73).

The ratio of the beginning stock to the domestic utilization for The ASEAN in 2012 was estimated to be about 10 percent down for 18 percent in 2011 (Table 71, Figure 74).

Trade

The cassava exported from the ASEAN in 2012 was 27.13 million tons, a slightly increase from 27.01 million tons in 2011. The cassava imported by the ASEAN in 2012 was reported to be 1.78 million tons, a substantial increase from 0.71 million tons in 2011. Thailand is the number exporter and one importer in the region (Table 67-68, Figure 66, 67, 69, 70).

The quantity and value of cassava export by countries of destination and the quantity and value of import by counties of origin are given in Table 72 and 73.

Prices

The FOB prices of cassava in the form of flour, shredded and pellets of Cambodia, Indonesia, the Philippines and Thailand between 2010 – 2012 and the CIF prices in Indonesia, the Philippines and Malaysia are shown in Table 74 – 75.

Damaged Area

The cassava damaged area in 2012 in the ASEAN was reported to be 115,313 hectares and all of the damage caused by the drought and flood. The damaged area has occurred in Thailand 90,465 hectares and in Cambodia 24,054 hectares (Table 66).

Prospects for Cassava in 2013

Production

The cassava production in the ASEAN in 2013 is forecast to be 76.20 million tons which is about 8 percent increase from 70.34 million tons in 2012. The increase in production is forecast in every country except in Myanmar. The increase mostly came from the increase in both area and yield. However, for Thailand, the increase in production attributed to the increase in yield only while the harvested area is forecast to slightly decrease (Table 62-65, Figure 62-65).

Utilization and Stock

The domestic utilization of cassava in 2013 is predicted to increase from 47.15 million tons in 2012 to 49.01 million tons in 2013, an increase of 1.86 million tons or about 4 percent. The beginning stock in 2013 is forecast to be 2.77 million tons, down from 4.93 million tons in 2012. The ending stock in 2013 is predicted to be 2.47 million tons, down 0.30 million tons or about 11 percent, compared to 2012.

The ratio of production to domestic utilization for 2013 is forecast to be 155 percent, compared to 149 percent in 2012 indicated that the self-sufficiency in cassava in the ASEAN is improved (Table 70). The ratio of beginning stock to the domestic utilization in 2013 is predicted to be 5.7 percent, compared to 10.5 in 2012 indicated that the cassava supply situation in the ASEAN is very tight (Table 71).

Trade

The cassava export from the ASEAN is expected to increase from 27.13 million tons in 2012 to 28.97 million tons in 2013. For the import, it is expected to decrease from 1.78 million tons in 2012 to 1.49 million tons in 2013 (Table 68-69, Figure 66, 68, 69 and 71)

Table 62 Cassava production in ASEAN countries, 2011-2013

Unit: 1,000 Tons

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	67,487.35	70,342.55	2,855.21	4.23	76,199.22	5,856.67	8.33
Brunei	0.14	0.16	0.02	14.73	0.16	0.00	-1.09
Cambodia	8,033.84	7,558.69	-475.16	-5.91	8,382.00	823.32	10.89
Indonesia	24,044.03	22,677.87	-1,366.16	-5.68	26,449.84	3,771.97	16.63
Lao PDR	743.19	789.18	45.99	6.19	1,013.80	224.63	28.46
Malaysia	39.05	41.00	1.95	5.00	42.45	1.45	3.54
Myanmar	607.10	729.92	122.82	20.23	567.50	-162.42	-22.25
Philippines	2,209.68	2,252.85	43.17	1.95	2,346.23	93.37	4.14
Singapore	-	-	-	-	-	-	-
Thailand	21,912.42	26,601.09	4,688.67	21.40	27,547.24	946.15	3.56
Vietnam	9,897.90	9,691.80	-206.10	-2.08	9,850.00	158.20	1.63

Table 63 Cassava planted area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	3,619.10	3,691.71	72.61	2.01	3,808.16	116.45	3.15
Brunei	-	-	-	-	-	-	-
Cambodia	391.71	358.95	-32.76	-8.36	393.00	34.05	9.49
Indonesia	1,184.70	1,116.80	-67.89	-5.73	1,236.26	119.46	10.70
Lao PDR	31.14	32.02	0.89	2.84	42.33	10.31	32.20
Malaysia	2.91	3.05	0.15	5.02	3.21	0.15	4.98
Myanmar	44.99	56.54	11.55	25.68	43.70	-12.84	-22.71
Philippines	221.24	218.77	-2.47	-1.12	220.50	1.73	0.79
Singapore	-	-	-	-	-	-	-
Thailand	1,184.02	1,356.28	172.25	14.55	1,316.17	-40.11	-2.96
Vietnam	558.40	549.30	-9.10	-1.63	553.00	3.70	0.67

Table 64 Cassava planted area in ASEAN countries, 2011-2013

Unit: 1,000 Hectares

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	3,547.51	3,577.40	29.89	0.84	3,742.29	164.89	4.61
Brunei	-	-	-	-	-	-	-
Cambodia	369.52	334.90	-34.62	-9.37	379.90	45.00	13.44
Indonesia	1,184.70	1,116.80	-67.89	-5.73	1,236.26	119.46	10.70
Lao PDR	31.14	33.02	1.89	6.05	42.33	9.31	28.20
Malaysia	2.15	2.26	0.11	5.02	2.32	0.06	2.70
Myanmar	44.99	56.54	11.55	25.68	43.18	-13.36	-23.63
Philippines	221.24	218.77	-2.47	-1.12	220.50	1.73	0.79
Singapore	-	-	-	-	-	-	-
Thailand	1,135.39	1,265.81	130.42	11.49	1,264.81	-1.00	-0.08
Vietnam	558.40	549.30	-9.10	-1.63	553.00	3.70	0.67

Note: Vietnam reported only planted area.

Table 65 Cassava yield in ASEAN countries, 2011-2013

Unit: Ton/Hectare

Country	2011 (2010/11)	2012 (2011/12)	change 2012 over 2011		2013 (2012/13)	change 2013 over 2012	
			Quantities	(%)		Quantities	(%)
ASEAN	19.02	19.66	0.64	3.36	20.36	0.70	3.56
Brunei	-	-	-	-	-	-	-
Cambodia	21.74	22.57	0.83	3.82	22.06	-0.51	-2.26
Indonesia	20.30	20.31	0.01	0.05	21.40	1.09	5.37
Lao PDR	23.87	23.90	0.03	0.13	23.95	0.05	0.21
Malaysia	18.15	18.15	0.00	0.00	18.30	0.15	0.83
Myanmar	13.50	12.91	-0.59	-4.37	13.14	0.23	1.78
Philippines	9.99	10.30	0.31	3.10	10.64	0.34	3.30
Singapore	-	-	-	-	-	-	-
Thailand	19.30	21.02	1.72	8.91	21.78	0.76	3.62
Vietnam	17.73	17.64	-0.09	-0.51	17.81	0.17	0.96

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

**Table 66 Cassava damaged area in ASEAN
by cause of damage, 2012**

Country	Cause of Damage (Hectares)						
	Flood	Drought	Pests	Diseases	Other	Unspecified	Total
ASEAN	45,659	68,860	-	-	-	794	115,313
Brunei	-	-	-	-	-	-	-
Cambodia	-	24,054	-	-	-	-	24,054
Indonesia	-	-	-	-	-	-	-
Lao PDR	-	-	-	-	-	-	-
Malaysia	-	-	-	-	-	794	794
Myanmar	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-
Singapore	-	-	-	-	-	-	-
Thailand	45,659	44,806	-	-	-	-	90,465
Vietnam	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Table 67 Cassava balance sheet of ASEAN countries, 2011 (Cassava roots fresh)

Unit: Tons

Country	Supply			Demand				
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	8,000,725	67,487,346	707,809	76,195,880	44,256,036	27,011,098	4,928,746	76,195,880
Brunei	-	141	3	144	144	-	-	144
Cambodia	-	8,033,843	-	8,033,843	5,864,705	2,169,138	-	8,033,843
Indonesia	1,996,659	24,044,025	-	26,040,684	23,464,000	-	2,576,684	26,040,684
Lao PDR	3,716	743,190	10,805	757,711	631,712	80,667	45,332	757,711
Malaysia	-	39,047	16	39,063	38,883	95	85	39,063
Myanmar	-	607,100	3,300	610,400	610,400	-	-	610,400
Philippines	-	2,209,684	12,706	2,222,390	2,221,292	1,098	-	2,222,390
Singapore1/	-	-	100,000	100,000	99,900	100	-	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	350	9,897,900	-	9,898,250	4,735,000	5,163,000	250	9,898,250

Table 68 Cassava balance sheet of ASEAN countries, 2012 (Cassava roots fresh)

Unit: Tons

Country	Supply			Demand				
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	4,928,746	70,342,553	1,780,778	77,052,077	47,151,130	27,130,729	2,770,218	77,052,077
Brunei1/	-	162	3	165	165	-	-	165
Cambodia	-	7,558,685	-	7,558,685	6,059,000	1,499,685	-	7,558,685
Indonesia	2,576,684	22,677,866	642,792	25,897,342	25,390,505	6,379	500,458	25,897,342
Lao PDR	45,332	789,178	9,204	843,714	676,674	122,871	44,169	843,714
Malaysia	85	40,998	108	41,191	40,826	309	56	41,191
Myanmar	-	729,920	-	729,920	729,920	-	-	729,920
Philippines1/	-	2,252,854	28,671	2,281,525	2,280,140	1,385	-	2,281,525
Singapore 1/	-	-	100,000	100,000	99,900	100	-	100,000
Thailand	2,306,395	26,601,090	1,000,000	29,907,485	7,103,000	20,579,000	2,225,485	29,907,485
Vietnam	250	9,691,800	-	9,692,050	4,771,000	4,921,000	50	9,692,050

Table 69 Cassava balance sheet of ASEAN countries, 2013 (Cassava roots fresh)

Unit: Tons

Country	Supply			Demand				
	Beginning Stock	Production	Imports	Total	Domestic Utilization	Exports	Ending stock	Total
ASEAN	2,770,218	76,199,221	1,485,776	80,455,215	49,008,340	28,973,230	2,473,645	80,455,215
Brunei1/	-	160	5	165	165	-	-	165
Cambodia	-	8,382,000	-	8,382,000	6,224,555	2,157,445	-	8,382,000
Indonesia	500,458	26,449,835	642,000	27,592,293	26,449,835	6,000	1,136,458	27,592,293
Lao PDR	44,169	1,013,804	15,000	1,072,973	811,043	200,000	61,930	1,072,973
Malaysia	56	42,450	100	42,606	40,826	300	1,480	42,606
Myanmar	-	567,502	-	567,502	567,502	-	-	567,502
Philippines1/	-	2,346,228	28,671	2,374,899	2,373,514	1,385	-	2,374,899
Singapore 1/	-	-	100,000	100,000	99,900	100	-	100,000
Thailand	2,225,485	27,547,242	700,000	30,472,727	7,591,000	21,608,000	1,273,727	30,472,727
Vietnam	50	9,850,000	-	9,850,050	4,850,000	5,000,000	50	9,850,050

Note: 1/ The value is estimated by AFSIS Project

Table 70 Ratio of cassava production to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)	Production	Domestic Utilization	Ratio (%)
ASEAN	67,487,346	44,256,036	152.49	70,342,553	47,151,130	149.19	76,199,221	49,008,340	155.48
Brunei	141.00	144	98.09	161.77	165	98.08	160.0	165	96.97
Cambodia	8,033,843	5,864,705	136.99	7,558,685	6,059,000	124.75	8,382,000	6,224,555	134.66
Indonesia	24,044,025	23,464,000	102.47	22,677,866	25,390,505	89.32	26,449,835	26,449,835	100.00
Lao PDR	743,190	631,712	117.65	789,178	676,674	116.63	1,013,804	811,043	125.00
Malaysia	39,047	38,883	100.42	40,998	40,826	100.42	42,450	40,826	103.98
Myanmar	607,100	610,400	99.46	729,920	729,920	100.00	567,502	567,502	100.00
Philippines	2,209,684	2,221,292	99.48	2,252,854	2,280,140	98.80	2,346,228	2,373,514	98.85
Singapore	-	99,900	-	-	99,900	-	-	99,900	-
Thailand	21,912,416	6,590,000	332.51	26,601,090	7,103,000	374.50	27,547,242	7,591,000	362.89
Vietnam	9,897,900	4,735,000	209.04	9,691,800	4,771,000	203.14	9,850,000	4,850,000	203.09

Table 71 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2011-2013

Unit: Tons

Country	2011			2012			2013		
	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)	Beginning Stock	Domestic Utilization	Ratio (%)
ASEAN	8,000,725	44,256,036	18.08	4,928,746	47,151,130	10.45	2,770,218	49,008,340	5.65
Brunei	-	144	-	-	165	-	-	165	-
Cambodia	-	5,864,705	-	-	6,059,000	-	-	6,224,555	-
Indonesia	1,996,659	23,464,000	8.51	2,576,684	25,390,505	10.15	500,458	26,449,835	1.89
Lao PDR	3,716	631,712	0.59	45,332	676,674	6.70	44,169	811,043	5.45
Malaysia	-	38,883	-	85	40,826	0.21	56	40,826	0.14
Myanmar	-	610,400	-	-	729,920	-	-	567,502	-
Philippines	-	2,221,292	-	-	2,280,140	-	-	2,373,514	-
Singapore	-	99,900	-	-	99,900	-	-	99,900	-
Thailand	6,000,000	6,590,000	91.05	2,306,395	7,103,000	32.47	2,225,485	7,591,000	29.32
Vietnam	350	4,735,000	0.01	250	4,771,000	0.01	50	4,850,000	-

Table 72 Quantity and Value of Cassava Export by Countries of Destination in 2012 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	28	98,301							261	115,589			827	331,980
Lao PDR														
Malaysia														
Myanmar														
Philippines														
Singapore														
Thailand	250	128,937	370	282,629	683,952	305,197,650	3,296	1,468,991	227,637	106,721,516	2,014	1,869,059	117,911	39,862,899
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	20	21,186	7	7,175			1,143	574,231		5,236	3,733,751		6,379	4,307,982	
Lao PDR													122,871	5,394,327	
Malaysia	304	66,990		269			304	67,259		5	11,249		309	78,508	
Myanmar															
Philippines										478	779,203		478	779,203	
Singapore															
Thailand	48,495	21,945.354								5,737,219	1,809,136,873		6,830,390	2,294,345,034	
Vietnam															

Remark: The data in this table is obtained from national focal points of member

Table 73 Quantity and Value of Cassava Import by Countries of Origin in 2012

Quantity: Tons Values: US\$

Exporting 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										200	83,000	5,600	2,294,375	
Lao PDR														
Malaysia					39	58,739								
Myanmar														
Philippines					40	19,609								
Singapore														
Thailand			686,307	77,397,541	276	121,535	13,386	2,501,456	124	399,153	1,003		3	7,813
Vietnam														

Exporting 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	Quantity	Values	Quantity	Values										
Brunei																
Cambodia																
Indonesia			555,028	253,467,648	75,292	31,645,894	636,120	287,490,917	6,672	1,940,594	642,792	289,431,511				
Lao PDR			9,204	27,363			9,204	27,363			9,204	27,363				
Malaysia			58	2,784	0	113	97	61,637	11	20,758	109	82,395				
Myanmar																
Philippines					78	21,892	118	41,501			118	41,501				
Singapore																
Thailand	97.00	328,271			261	100,567	701,457	81,363,971	716,200	118,760,334	1,417,657	200,124,305				
Vietnam								0								0

Remark: The data in this table is obtained from national focal points of member

Unit: US\$/Ton

Table 74 FOB Price of Cassava in selected ASEAN countries

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	430	525	560	605	655	640	530	535	510	527
		2012	470	480	510	530	600	650	620	660	650	545	540	520	565
	Shredded	2010	204	212	246	250	165			176	176	178		301	212
		2011	228	229	238	239	236			190	200	210		295	229
		2012	215	235	240	241	245			200	210	210		300	233
Indonesia	Flour	2011	575	535	532	538	544	553	610	580	594	583	632	639	576
		2012	634	627	541	629	518	681	651	625					613
		2011	311	244	260	266	271	273	250	232	254	268	274	268	264
	Shredded	2012	312	264	263	574	502	379	394	1,865					569
		2011	1,324	1,405	1,492	1,430		1,469	100	1,469	1,500	1,627	1,408	1,300	1,320
		2012	1,645	2,376	1,410	1,682	1,664	1,672	1,996	1,952					1,800
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	1,499	1,485	1,552	1,513	1,198	1,371	1,463	1,536	1,218	1,418
		2012	1,411	1,695	1,673	1,658	1,679	1,665	1,645						1,632
	Starch	2010	366	379	403	407	435	447	459	524	533	511	523	541	461
		2011	544	553	564	573	580	531	493	471	442	430	434	444	505
		2012	537	460	436	425	425	435	445	445	438	443	443	443	448
Thailand	Pellets	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	256	237	258
		2012	255	318	233	222	208	182	217	210	230	227	230	225	230
	Shredded	2010	169	167	183	183	190	195	202	212	219	225	226	234	200
		2011	244	253	269	269	276	276	266	265	264	251	269	258	263
		2012	249	254	234	238	235	235	228	228	233	233	235	236	237

Unit: US\$/Ton

Table 75 CIF Price of Cassava in selected ASEAN countries

Country	Product	Year	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Average
Indonesia	Flour	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
		2012	312	264	263	574	502	379	394						384
Philippines	Flour	2010	200	210	210	200			220	220		220			211
		2011	285	287									184		252
Malaysia	Pellets	2011	991		2,503	808					1,343			1,161	1,361
		2012		804		809	4,933	1,310	1,562	463					1,647

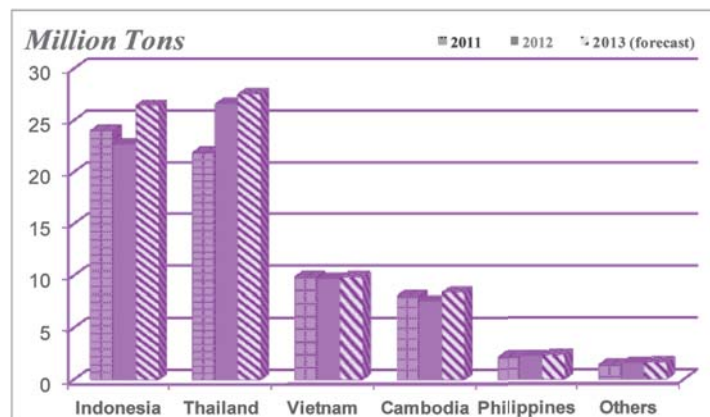


Figure 62 Cassava production of selected countries in ASEAN, 2011-2013

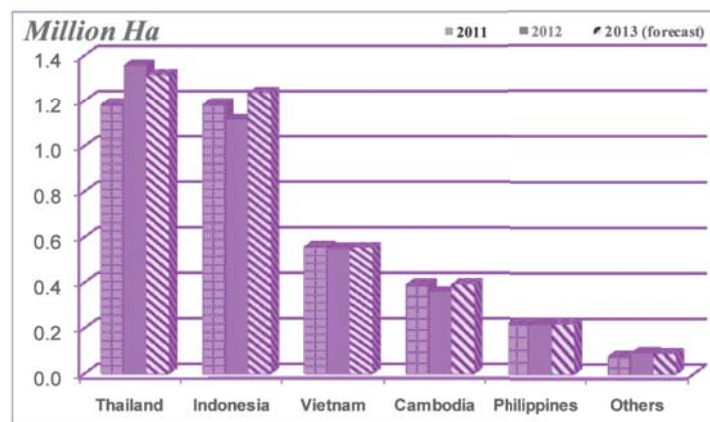


Figure 63 Cassava planted area of selected countries in ASEAN, 2011-2013

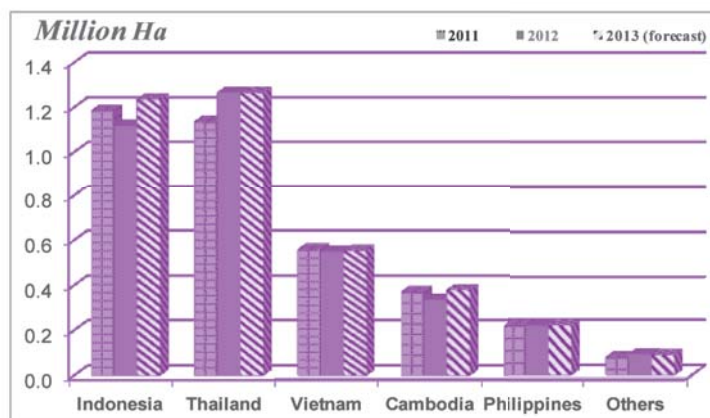


Figure 4 Cassava harvested area of selected countries in ASEAN, 2011-2013

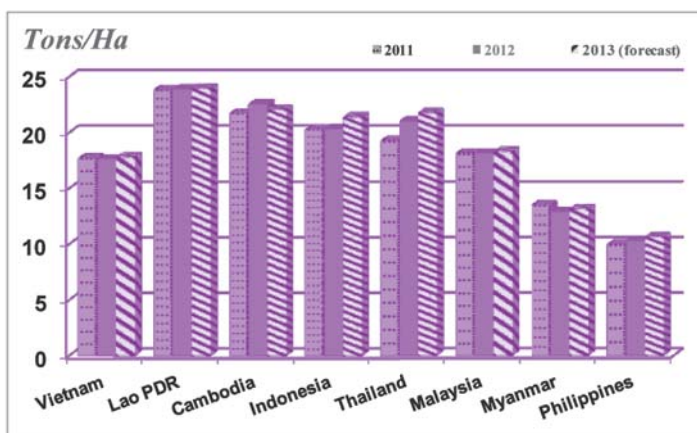


Figure 65 Cassava yield of countries in ASEAN, 2011-2013

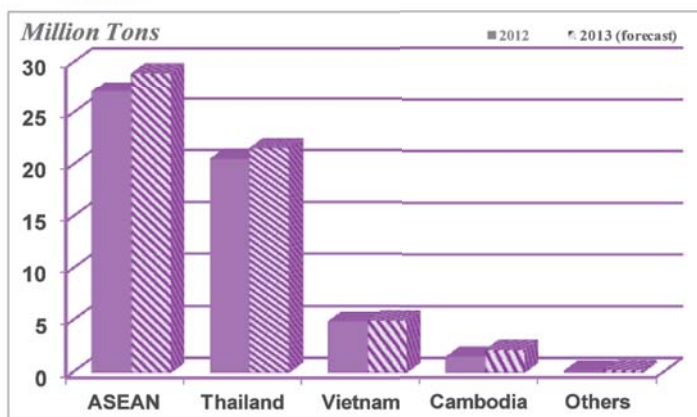


Figure 66 Amount of cassava export (million tons) of selected countries in ASEAN in 2012-2013

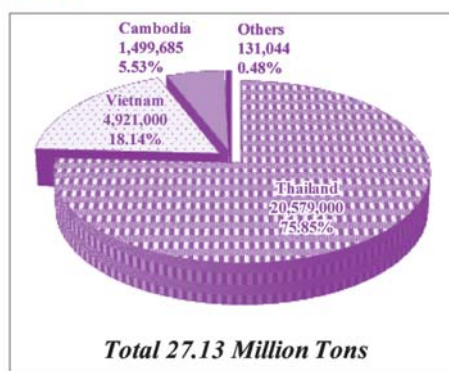


Figure 67 Share of cassava export (tons) among ASEAN countries, 2012

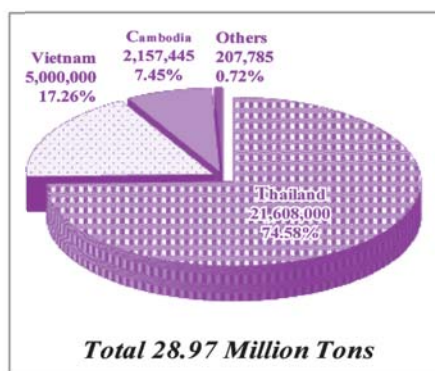


Figure 68 Share of cassava export (tons) among ASEAN countries, 2013

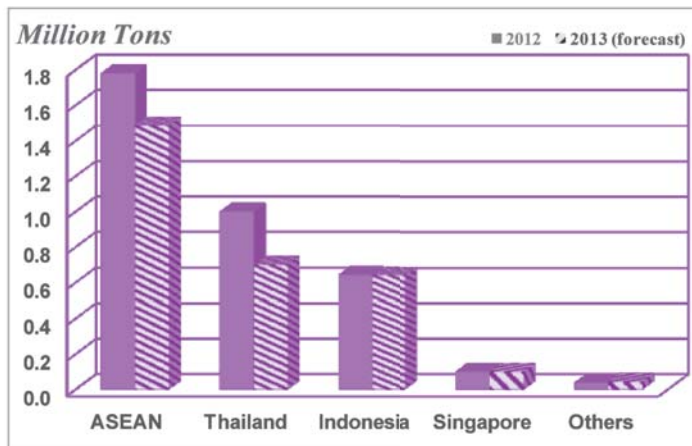


Figure 69 Amount of cassava import (million tons) by selected countries in ASEAN in 2012-2013

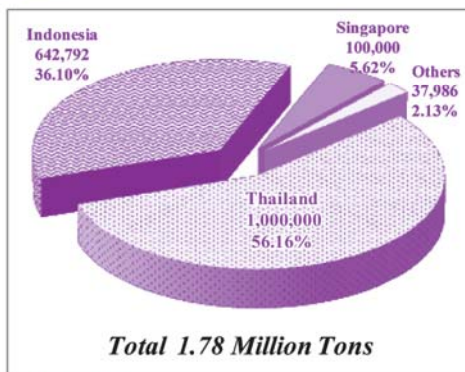


Figure 70 Share of cassava import (tons) among ASEAN countries, 2012

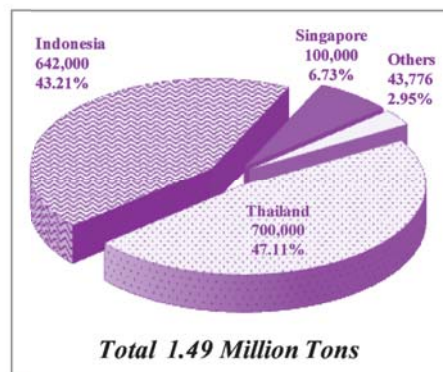


Figure 71 Share of cassava import (tons) among ASEAN countries, 2013

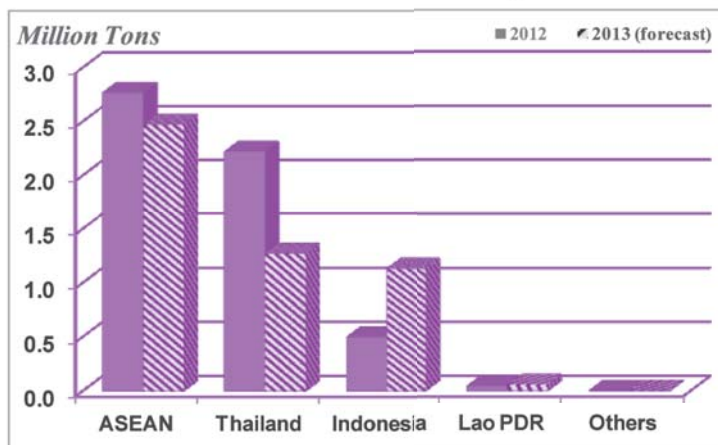


Figure 72 Amount of ending stock of cassava in ASEAN countries in 2012-2013

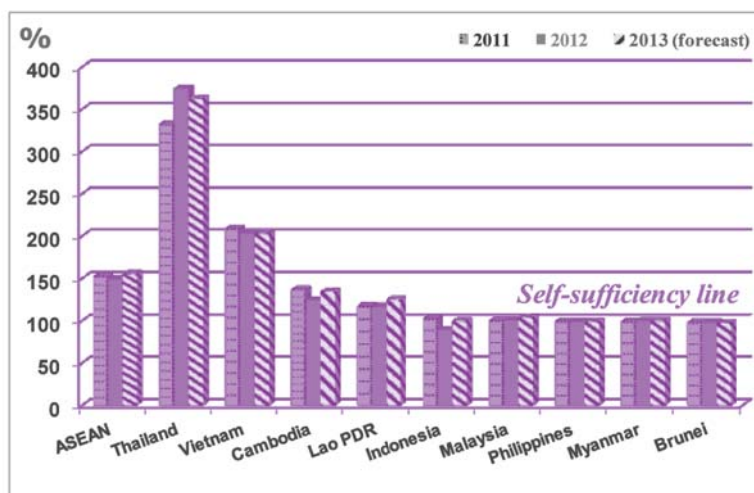


Figure 73 Ratio of cassava production to domestic utilization in ASEAN countries, 2011-2013

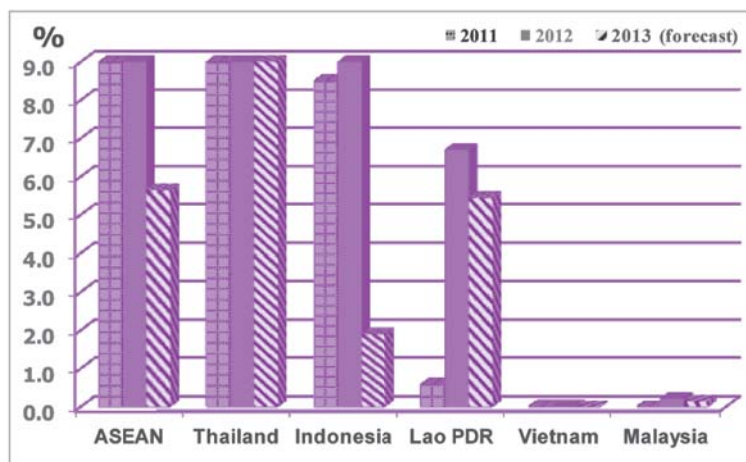


Figure 74 Ratio of cassava beginning stock to domestic utilization in ASEAN countries, 2011-2013

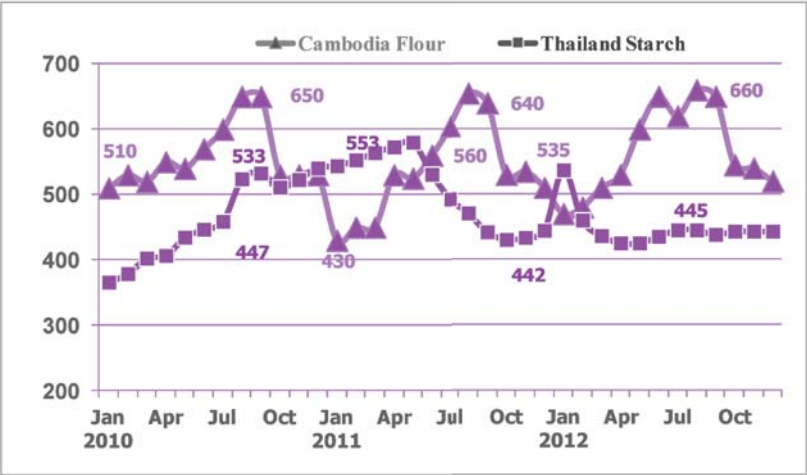


Figure 75 FOB price (US\$/Ton) of cassava flour of selected countries in ASEAN in 2010-2012



Figure 76 FOB price (US\$/Ton) of cassava pellets of selected countries in ASEAN in 2010-2012



Explanatory notes

Production of Paddy for 2013

Brunei:

- Wet season refers to the crop harvested during August to October 2013.
- Dry season refers to the crop harvested during February to April 2013.

Cambodia:

- Wet season refers to the crop harvested during August to December 2012.
- Dry season refers to the crop harvested during January to March 2013.

Indonesia:

- Sumatera refers to the crop harvested during May to July 2012 and the crop harvested during November 2013 to January 2014.
- Jawa, Bali and West Nusa refer to the crop harvested during April to July 2013 and the crop harvested during October to December 2013.
- East Nusa refers to the crop harvested during June to September 2013.
- Kalimantan refers to the crop harvested during March to June 2013 and the crop harvested during August to November 2013.
- Sulawesi refers to the crop harvested during June to August 2013 and the crop harvested during November 2013 to January 2014.
- Maluku and Papua refer to the crop harvested during April to July 2013 and the crop harvested during August to November 2013.

Lao PDR:

- Wet season refers to the crop harvested during September 2012 to January 2013.
- Dry season refers to the crop harvested during February to May 2013.

Malaysia:

- Wet season refers to the crop harvested during December 2012 to June 2013.
- Dry season refers to the crop harvested during July to November 2013.

Myanmar:

- Wet season refers to the crop harvested during August 2012 to January 2013.
- Dry season refers to the crop harvested during February to August 2013.

Philippines:

- Wet season refers to the crop harvested during September to December 2013.
- Dry season refers to the crop harvested during February to May 2013.

Thailand:

Wet season

- North, Northeast and Center refer to the crop harvested during August 2012 to February 2013. The bulk of harvest occurred in November to December 2012.
- South refers to the crop harvested during November 2012 to April 2013. The bulk of harvest occurred in February 2013.

Dry season

- North, Northeast and Center refer to the crop harvested during February to August 2013.
- South refers to the crop harvested during March to October 2013.

Vietnam:

Spring-season

- North refers to the crop harvested during June to July 2013.
- South refers to the crop harvested during February to May 2013.

Autumn-season

- North refers to the crop harvested during August to September 2013.

- South refers to the crop harvested during July to September 2013.

Winter-season

- North refers to the crop harvested during October to November 2013.
- South refers to the crop harvested during October 2013 to January 2014.

Production of Maize for 2013

Cambodia:

- 1st crop harvested during February to March 2013.
- 2nd crop harvested during August to October 2013.

Indonesia:

- 1st crop harvested during January to April 2013.
- 2nd crop harvested during May to August 2013.
- 3rd crop harvested during September to December 2013.

Lao PDR:

- 1st crop harvested during June to July 2013.
- 2nd crop harvested during September to December 2013.

Myanmar:

- 1st crop harvested during January to March 2013.
- 2nd crop harvested during August to November 2013.

Philippines:

- 1st crop harvested during February to May 2013.
- 2nd crop harvested during July to November 2013.

Thailand:

- 1st crop harvested during February to July 2013.
- 2nd crop harvested during August 2013 to January 2014.

Vietnam:

- 1st crop harvested during January to March 2013.
- 2nd crop harvested during April to September 2013.
- 3rd crop harvested during July 2013 to January 2014.

- 2nd crop harvested during July to December 2013.

Thailand:

- 1st crop harvested during February to May 2013.
- 2nd crop harvested during July to December 2013.

Vietnam:

- 1st crop harvested during February to May 2013.
- 2nd crop harvested during August to November 2013.

Production of Cassava for 2013

Cambodia:

- The crop harvested during half November to December 2013.

Indonesia:

- 1st crop harvested during January to April 2013.
- 2nd crop harvested during May to August 2013.
- 3rd crop harvested during September to December 2013.

Lao PDR:

- The crop harvested during December 2012 to February 2013.

Malaysia:

- The crop harvested during October 2012 to December 2013.

Myanmar:

- The crop harvested during January to March 2013.

Philippines:

- 1st crop harvested during January to June 2013.
- 2nd crop harvested during July to December 2013.

Thailand:

- The crop harvested during October 2012 to September 2013.

Vietnam:

- 1st crop harvested during February to March 2013.
- 2nd crop harvested during September to October 2013.

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 : Small amount

- 2nd crop harvested during July to December 2013.

Thailand:

- 1st crop harvested during February to May 2013.
- 2nd crop harvested during July to December 2013.

Vietnam:

- 1st crop harvested during February to May 2013.
- 2nd crop harvested during August to November 2013.

Production of Cassava for 2013

Cambodia:

- The crop harvested during half November to December 2013.

Indonesia:

- 1st crop harvested during January to April 2013.
- 2nd crop harvested during May to August 2013.
- 3rd crop harvested during September to December 2013.

Lao PDR:

- The crop harvested during December 2012 to February 2013.

Malaysia:

- The crop harvested during October 2012 to December 2013.

Myanmar:

- The crop harvested during January to March 2013.

Philippines:

- 1st crop harvested during January to June 2013.
- 2nd crop harvested during July to December 2013.

Thailand:

- The crop harvested during October 2012 to September 2013.

Vietnam:

- 1st crop harvested during February to March 2013.
- 2nd crop harvested during September to October 2013.

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 : Small amount

Milling Rate of Rice (2013)

Unit : Tons

Country	Paddy	Rice
ASEAN	1	0.63
Brunei	1	0.58
Cambodia	1	0.64
Indonesia	1	0.58
Lao PDR	1	0.61
Malaysia	1	0.66
Myanmar	1	0.63
Philippines	1	0.65
Thailand	1	0.69
Vietnam	1	0.62

Extraction rate of Sugar (2013)

Unit : Tons

Country	Sugarcane	Sugar
ASEAN	1,000	106.37
Cambodia	1,000	100.00
Indonesia	1,000	153.85
Lao PDR	1,000	200.00
Myanmar	1,000	100.00
Philippines	1,000	93.56
Thailand	1,000	104.18
Vietnam	1,000	90.91



ANNEX 1

Rice crop calendar (harvested months) for crop year 2012/13 (2013) in ACO-9 report

Country		2012					2013												2014		
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Brunei	Wet season																				
	Dry season																				
Cambodia	Wet season																				
	Dry season																				
Indonesia	Wet season																				
	Dry season																				
Lao PDR	Wet season																				
	Dry season																				
Malaysia	Wet season																				
	Dry season																				
Myanmar	Wet season																				
	Dry season																				
Philippines	Wet season																				
	Dry season																				
Thailand	Wet season																				
	Dry season																				
Vietnam	Spring																				
	Autumn																				
	Winter																				

ANNEX 2

Maize crop calendar (harvested months) for crop year 2012/13 (2013) in ACO-9 report

Country	Crop	2012			2013												2014	
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Cambodia	1st																	
	2nd																	
Indonesia	1st																	
	2nd																	
	3rd																	
Lao PDR	1st																	
	2nd																	
Myanmar	1st																	
	2nd																	
Philippines	1st																	
	2nd																	
Thailand	1st																	
	2nd																	
Vietnam	1st																	
	2nd																	
	3rd																	

ANNEX 3

Sugarcane crop calendar (harvested months) for crop year 2012/13 (2013) in ACO-9 report

Country	Crop	2012				2013											
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cambodia	1st								←	→							
	2nd														←	→	
Indonesia						←	→	←	→	←	→	←	→	←	→	←	→
Lao PDR						←	→	←	→	←	→						
Myanmar									←	→							
Philippines						←	→	←	→	←	→						
Thailand						←	→	←	→	←	→						
Vietnam						←	→	←	→	←	→						

ANNEX 4

Soybean crop calendar (harvested months) for crop year 2012/13 (2013) in ACO-9 report

Country	Crop	2012				2013												2014	
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Cambodia	1st																		
	2nd																		
Indonesia	1st																		
	2nd																		
	3rd																		
Lao PDR	1st																		
	2nd																		
Myanmar	1st																		
	2nd																		
Philippines	1st																		
	2nd																		
Thailand	1st																		
	2nd																		
Vietnam	1st																		
	2nd																		

ANNEX 5

Cassava crop calendar(harvested months) for crop year 2012/13 (2013) in ACO-9 report

Country	Crop	2012				2013											
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Cambodia	1st																↔
	2nd																
Indonesia	1st																
	2nd																
	3rd																
Lao PDR	1st																
	2nd																
Malaysia	1st																
	2nd																
Myanmar	1st																
	2nd																
Philippines	1st																
	2nd																
Thailand	1st																
	2nd																
Vietnam	North																
	South																



ANNEX 6

List of Delegates The 9th Agricultural Commodity Outlook Committee Meeting 18 - 19 December 2012

Name	Position
1. Mr. Montol Jeamchareon	AFSIS Project Manager Ministry of Agriculture and Cooperatives Thailand
2. Ms. Pouchamarn Wongsanga	Senior Officer Agriculture Industries & Natural Resources Division ASEAN Secretariat
3. Dr. Anjah Abdul Rahman	Head of Research and Management Information System Policy & Planning Division Ministry of Industry and Primary Resources Brunei Darussalam
4. Mr. Tuor Vannak	Deputy Chief of Statistics Office Department of Planning and Statistics Ministry of Agriculture Forestry and Fisheries Cambodia
5. Mr. Muhammad Tassim Billah	Director of Center for Agricultural Data and Information Systems Ministry of Agriculture Indonesia
6. Ms. Vivanh Souvannamethy	Deputy Director of Center for Statistics and Information (CSI) Department of Planning and Cooperation (DOPC) Ministry of Agriculture & Forestry(MAF) Lao PDR
7. Mr. Wan Zakaria Bin Wan Ibrahim	Deputy Undersecretary International And Strategic Planning Division Malaysia
8. Dr. Win Htut	Deputy Director Settlement and Land Records Department Ministry of Agriculture and Irrigation Yangon, Myanmar

- 9. Ms. Maura Santiago Lizarondo** Director III Department of Agriculture
Bureau of Agricultural Statistics
- 10. Ms. Nareenat Roonnaphai** Inspector General Ministry of
Agriculture and Cooperatives
Thailand
- 11. Ms. Unchana Tracho** Director Centre for Agricultural
Information Office of Agricultural
Economics Ministry of Agriculture and
Cooperatives Thailand
- 12. Mr. Pham Minh Tri** Head of Division
Center for Informatics and Statistics
Ministry of Agriculture and Rural
Development Vietnam
- 13. Mr. Yasuhiro MIYAKE** Deputy Director Statistics Planning
Division, Statistics Department
Ministry of Agriculture, Forestry and
Fisheries Japan
- 14. Mr. Shoji KIMURA** Japanese Expert Office of Agricultural
Economics Ministry of Agriculture and
Cooperatives Thailand
- 15. Mr. Yasushi Uchikawa** Expert ASEAN Plus Three Emergency
Rice Reserve (APTERR) Office of
Agricultural Economics
Ministry of Agriculture and
Cooperatives Thailand
- 16. Dr. Apichart Pongsrihadulchai** AFSIS Consultant Adviser to the
Minister Chairman of the Meeting
Ministry of Agriculture and
Cooperatives Thailand

