THE 39th MEETING OF THE ASEAN FOOD SECURITY RESERVE BOARD (AFSRB)

15-16 August 2019

Thailand

THE 38TH ASEAN FOOD SECURITY RESERVE BOARD CHAIRMAN'S REPORT ON THE ACTIVITIES FOR 2018-2019
BY MS ONG SIEW HWEE, DIRECTOR, CORPORATE STRATEGY & ADMINISTRATION DIVISION, ENTERPRISE SINGAPORE
AT THE 39TH MEETING OF ASEAN FOOD SECURITY RESERVE BOARD
THAILAND, 15 – 16 AUGUST 2019

Distinguished delegates from the ten (10) ASEAN Member States,

ASEAN Secretariat

Representatives from the ASEAN Plus Three Emergency Rice Reserve (APTERR),

ASEAN Food Security Reserve Board (AFSIS),

Secretariat of ASEAN Food Security Reserve Board,

Distinguished guests,

Ladies and Gentlemen,

1. Good morning and a warm welcome to the 39th Meeting of the ASEAN Food Security Board. It is my privilege and honour to deliver the Chairman's Report covering the Activities of the AFSRB since our last Meeting held in Singapore in Aug 2018. On behalf of AFSRB, I would like to express my deepest appreciation to the Government of Thailand especially the Department of Foreign Trade and the AFSRB Secretariat for the excellent support and logistical arrangement made in organizing this meeting.

2. Allow me to share with you the ASEAN activities on food security that have been carried out since the last AFSRB Meeting.

Special Senior Officials Meeting of the 39th Meeting of the ASEAN Ministers on Agriculture and Forestry (Special SOM-39th AMAF)

3. At the Special Senior Officials Meeting of the 39th Meeting of the ASEAN Ministers on Agriculture and Forestry (Special SOM-39th AMAF) held on 27-28 August 2018, the meeting took note of the outcome of the 38th Meeting of the AFSRB, which include:

   (i) Adoption of the report of the 38th Meeting of the AFSRB;

   (ii) Review of the implementation of the AIFS Framework and SPA FS 2015-2020;

   (iii) Concurrence that the existing five (5) agricultural commodities, namely rice, maize, soybean, sugar and cassava, currently monitored adequately cover the key crops in food security; and in the future, the other commodities such as livestock and fisheries should be considered as they are also important daily food sources for the majority of population in ASEAN;

   (iv) Provision of information paper on the MRLs issue to ASEAN Sectoral Working group on Crops (ASWGC) for them to look into the matter and provide recommendation to SOM-AMAF.

MOU between ASEAN and FAO

4. A Memorandum of Understanding (MOU) between ASEAN member states and Food and Agriculture Organization (FAO) on Strengthening Cooperation in Agriculture and Forestry was signed at the 40th Meeting of the ASEAN Ministers on Agriculture and Forestry (AMAF) in October 2018.

5. The objective of the MOU is to strengthen the collaboration between ASEAN Member States and FAO in the fields of agriculture, food security, nutrition, food safety, and in the context of food and agricultural sectors, sustainable natural resource management, climate change response, biodiversity conservation, poverty reduction and rural development.

6. A draft work programme of the ASEAN-FAO Cooperation on Food, Agriculture and Forestry (2019-2025), drawn up by FAO for operationalization of the MOU, was circulated by the ASEAN Secretariat to ASEAN Member States for review.

7. A proposed activity tasked under AFSRB is the development of ASEAN guidelines on food and nutrition-related policies for consumption and production. This aims at improving regional policy environment for food safety, food security and nutrition contributing to the eradication of hunger and malnutrition in the Southeast Asian region.

MRLs issue on rice applied by EU

8. At the ASEAN Sectoral Working group on Crops (ASWGC) held on 3-5 July 2019, the Meeting noted the ASEAN Secretariat information paper on the MRLs issue on rice applied by EU, raised by Cambodia during 38th AFSRB meeting. The Meeting discussed the outcomes of the 23rd Meeting of the Expert Working Group on Harmonisation of Maximum Residue Limits of the Pesticides Among ASEAN Countries (EWG-MRLs) with regards to this MRLs issue.

9. Taking into consideration available information and new developments, the Meeting agreed to recommend to SOM-AMAF that there is no necessity for ASEAN to send a letter to EU to express concern on the enforcement of European Commission Regulation (EU) 2017/983 that at this stage.

AFSIS' Statistic Database

10. AFSIS is developing a "Statistic System" which allows ASEAN Member States to update annual data from the web, and it is expected to be ready for testing by end of 2019.

11. It is critical for ASEAN to strengthen information sharing and its monitoring mechanism with increasing volume of data available in areas of common interests. This is instrumental in helping us build up early warning capabilities among ASEAN Member States through important platforms such as that developed by AFSIS. It will help to foster an inclusive and integrated ASEAN and facilitate policymakers in acquiring better understanding of the current status and identify gaps and areas of improvement.

Conclusion

12. Achieving food and nutrition security by maintaining ample food availability and at affordable and stable prices is fundamental to global peace and stability. Agriculture, is essential for ASEAN as majority of our population depends on it for survival and economic growth. Faced with increasing challenges from urbanisation, climate change, limited arable land and water, shortage of farm labour and volatility in international markets, it is of paramount importance that ASEAN Member States intensify our mutual relations and co-operation in food security.

13. I encourage all delegates and guests to participate actively during the next two days of the AFSRB meeting. I would like to make a call to action for everyone to join hands to work towards our common goals in achieving food security for ASEAN.

14. Lastly, I wish you a fruitful meeting and a delightful stay in Bangkok.

15. Thank you.

Opening Remarks
By Mr. Adul Chotinisakorn
Director - General of the Department of Foreign Trade
Ministry of Commerce of Thailand
At the 39th Meeting of ASEAN Food Security Reserve Board
On 15th August 2019

Distinguish Guests,
Ladies and Gentlemen,

On behalf of the Ministry of Commerce of Thailand, it is my pleasure to extend a warm welcome to all participants of the **39th Meeting of ASEAN Food Security Reserve Board**. First of all, I would like to take this opportunity to thank all of you for joining us here today.

This year is an important year for Thailand as the host of ASEAN summit, which also offers an opportunity to raise issues of concern which should be addressed by the ASEAN community as a whole for mutual benefits to all. In June, Thailand hosted the 34th ASEAN summit, which was a great success. The 39th meeting of ASEAN Food Security Reserve Board today can be seen as a part of joint cooperation between member states. On behalf of the Department of Foreign Trade, Ministry of Commerce of Thailand, it is my very great pleasure to host the 39th AFSRB which has been a platform for member states to exchange and share information regarding agricultural market situation and experience in food security management so that ASEAN becomes the base for food production of the world.

As you may already be well-aware, food security has become an issue of concern for many countries around the world. Each country has come up with measures aiming to protect their population from food insecurity. According to the FAO, as of 2018, the number of undernourished people is estimated to have reach 820.7 million, up by 37.1 million or 4.73% from the

figure of year 2015 at 7 8 3 . 7 million or around one person per nine. Undernourishment and food insecurity have exacerbated in many regions, especially in Africa and South America. Such exacerbation has been caused partly by climate change, natural catastrophe, and environmental degradation. Moreover, reduced attention to agricultural production while increasing production of energy crops have resulted in increased price of agricultural products. At the same time, demand for food has been increasing continuously due to global population growth.

ASEAN community is not an exception. Our food security has not improved much. The number of undernourished people at approximately 63.7 million people or 9.8% of the total ASEAN population reflects worrying situation. Therefore, it is important that ASEAN community together strengthen and gear ourselves up for challenges lying ahead.

It is good news that ASEAN countries have undertaken some measures to move towards food security and sustainability under cooperation frameworks including AFSRB, ASEAN Plus Three Emergency Rice Reserve and ASEAN Plus Three Food Security Information System. These platforms, however, only mark the beginning of cooperation at a more extensive scale.

Ladies and gentlemen,

Thailand is a country with an abundant natural resources and land and climate suitable for harvesting many agricultural crops such as rice, tapioca, corn, and cane. We have also placed importance on research and development of plant breeding, which has helped us to produce crops sufficient for domestic consumption, and leave surplus for export. Each year, Thailand is a top exporter of various food products, especially rice, tapioca, fishery products and livestock. However, economic and social changes as well as natural catastrophes have inevitably affected our food security and sustainability.

As a result, the Thai Government has implemented measures in response to the changing situation. One of our policies is to drive Thailand's agricultural product industries towards growth and supply that meets the needs of changing global demand. The aim is to make possible for main agricultural crops, especially rice, to remain cash crop that earn Thailand a tremendous revenue each year in accordance to the National Economic and Social Development plan. Additionally, the government is developing a strategic framework for food management which hopefully will become a masterplan for policy implementation in the future.

In conclusion,
To handle this challenging environment, I reiterate our determination and commitment to take concreted action to fulfill our goal of building food security. Cooperation among member states is a vital factor for success. Importance should be placed for rice in particular, as it is a staple food of ASEAN.

This meeting will provide a great platform not only for cooperation, but also following up and addressing concerns with regard to food security. More importantly, I hope that it will be the platform for pushing forward policies implementation at national level. With combined efforts, I believe that this meeting will serve as a driving force behind ASEAN's food security and sustainability.

Lastly, may I once again take this opportunity to say thank you for joining us. I hope that when this meeting is over, you will not only have pleasant memories of your stay but also be back in the near future to visit Thailand again.

THANK YOU

THE 39th MEETING OF

THE ASEAN FOOD SECURITY RESERVE BOARD (AFSRB)

15 - 16 August 2019, Thailand

ANNOTATED PROVISIONAL AGENDA

OPENING REMARKS

Thailand may wish to deliver the Opening Remarks.

AGENDA ITEM 1 : REPORT OF THE 38th AFSRB CHAIRMAN ON ACTIVITIES FOR 2018-2019

Singapore, representing the Chairperson of the 38th ASFRB may wish to report the regional activities regarding food security, conducted in 2018-2019.

AGENDA ITEM 2: ELECTION OF CHAIRPERSON AND VICE-CHAIRPERSON

The Meeting may wish to elect Thailand and Vietnam as Chairperson and Vice-chairperson, respectively.

AGENDA ITEM 3: ADOPTION OF THE AGENDA

The Meeting may wish to discuss and adopt the Agenda.

AGENDA ITEM 4: BUSINESS ARRANGEMENTS

The Meeting will decide the manner in which it would like to proceed.

AGENDA ITEM 5: MATTERS ARISING FROM THE MEETINGS OF SPECIAL-SOM 39th AMAF

The ASEAN Secretariat may wish to update the Meeting on the key decision and outcomes of those meetings related to food security in ASEAN.

AGENDA ITEM 6 : IMPLEMENTATION OF THE ASEAN INTEGRATED FOOD SECURITY FRAMEWORK (AIFS) AND STRATEGIC PLAN OF ACTION ON FOOD SECURITYSPA (2015-2020)

The Consultant may wish to update the mid-term review for the implementation of the AIFS Framework and SPA FS 2015-2020.

AGENDA ITEM 7 : REVIEW OF THE FOOD SITUATION

The AFSRB Secretariat may wish to update the Meeting on the world/ASEAN food situation for Rice, Sugar, Maize and Soybean in 2018-2019.

AGENDA ITEM 8 : SUPPLY AND DEMAND SITUATION REPORT ON RICE AND OTHER COMMODITIES IN 2018-2019 IN EACH ASEAN MEMBER STATES

Each ASEAN member state may wish to report The Meeting on supply and demand situation for rice and other commodities in 2018-2019.

Brunei Darussalam
Cambodia
Indonesia
Lao PDR
Malaysia
Myanmar
Philippines
Singapore
Thailand
Vietnam

AGENDA ITEM 9 : PROGRESS REPORT ON ASEAN PLUS THREE EMERGENCY RICE RESERVE (APTERR)

The APTERR Secretariat may wish to update the implementation of the APTERR Agreement.

AGENDA ITEM 10: PROGRESS REPORT ON ASEAN FOOD SECURITY INFORMATION SYSTEM (AFSIS)

The AFSIS Secretariat may wish to update the key activities/issues of AFSIS in 2018-2019.

AGENDA ITEM 11: OTHER MATTERS

The Meeting will discuss any other matters.

AGENDA ITEM 12: DATE AND VENUE OF THE NEXT MEETING

The Meeting may wish to make a confirmation on date and venue of the 40th AFSRB Meeting.

AGENDA ITEM 13: CONSIDERATION AND ADOPTION OF THE REPORT

The Meeting may wish to adopt the report of the 39th AFSRB Meeting.

AFSRB Secretariat
31 July 2019

Agenda item 5: Matter arising from the meetings of SOM AMAF and AMAF in 2018-2019

I. Special Senior Officials Meeting of the 39th Meeting of the ASEAN Ministers on Agriculture and Forestry (Special SOM-39th AMAF) on 27-28 August 2018, Pattaya, Thailand

i) Report of the 38th Meeting of the ASEAN Food Security Reserve Board (AFSRB)

14. The Meeting adopted the Report of the 38th Meeting of the ASEAN Food Security Reserve Board (AFSRB) held on 2-3 August 2018 in Singapore, which appears as **ANNEX 9.**

15. The Meeting noted that a mid-term review for the implementation of the AIFS Framework and SPA FS 2015-2020 would be conducted in 2018, and requested AFSRB Secretariat, in coordination with the ASEAN Secretariat to work with AMSs on the review.

Action Line: AFSRB Secretariat, AMSs and ASEAN Secretariat

16. Regarding the possibility of expanding other commodities under the AIFS Framework, the Meeting agreed that the existing five (5) agricultural commodities (rice, maize, soybean, sugar and cassava) currently being monitored adequately cover the key agricultural crops of significant value in food security. However, in the future, AFSRB members need to consider the inclusion of other commodities such as livestock and fisheries as they are also important daily food sources for the majority of population in ASEAN.

Action line: AFSRB, AFSRB Secretariat and ASEAN Secretariat

17. The Meeting noted the issues of MRL on rice applied by the European Union (EU) that is higher than codex MRL. The Meeting requested ASWGC to look into the matter and provide recommendation to SOM-AMAF. The Meeting requested AFSRB to provide information paper and relevant document on the MRL issue to ASWGC for consideration.

Action line: AFSRB and ASWGC

ii) ASEAN Multi-Sectoral Framework on Climate Change: Agriculture and Forestry Towards Food Security (AFCC)

18. The Meeting adopted the Reports of the 6th Meeting of the Ad-hoc Steering Committee on Climate Change: Agriculture and Forestry towards Food Security (AHSCCC-FS), held on 18-19 January 2018 in Lombok, Indonesia and the 7th Meeting of AHSCCC-FS, held on 28-30 June 2018 in Da Nang, Viet Nam. The Information Paper and the Reports appears as **ANNEX 10**.

19. The Meeting noted that the Multi Sectoral Framework on Climate Change: Agriculture and Forestry Towards Food and Nutrition Security and Achievements of SDGs (MSFCC) was endorsed by SOM-AMAF on 30 April 2018 through ad referendum. The endorsed MSFCC appears as **Appendix 1 of ANNEX 10.**

20. The Meeting noted the recommendation from the 6th and 7th Meetings of the AHSCCC-FS , namely:

i. To enhance coordination/collaboration between SOM-AMAF and other SOMs (environment, RDPE, health, science and technology) to implement the AFCC and to identify platform/mechanism for coordination across the sectors.
ii. To strengthen the Ad-hoc Steering Committee on Climate Change and Food Security as a permanent platform to oversee the implementation of the AFCC.
iii. To develop joint initiative (programme) that can accelerate and improve inter-sectoral collaboration in addressing climate change adaptation and mitigation.
iv. To continue inviting relevant sectors from different pillars of the ASEAN Cooperation to the Ad-hoc Steering Committee on Climate Change.
v. To expand partnerships with relevant international partners and where necessary to enhance private sectors and CSOs engagement in the dialogue of climate change.

21. The Meeting agreed that the Chair of SOM-AMAF will lead and coordinate with other SOMs to implement the AFCC Framework.

22. The Meeting requested the AHSCCC-FS in coordination with the ASEAN Secretariat to conduct an assessment on the establishment of a permanent platform to coordinate climate change issues. Noting the cross cutting nature of the climate change issue, the assessment will include a stock take whether any existing permanent platform in ASEAN can oversee and act as a central/ coordinating body for the implementation of AFCC Framework.

Action Line: AHSCCC-FS and ASEAN Secretariat

The Fortieth Meeting of the ASEAN Ministers on Agriculture and Forestry (40th AMAF) was held on 11 October 2018 in Ha Noi, Viet Nam

II. The Fortieth Meeting of the ASEAN Ministers on Agriculture and Forestry (40th AMAF) on 11 October 2018 in Ha Noi, Viet Nam

A. Cooperation in Food

14. The Meeting noted that the ASEAN Food Security Reserve Board (AFSRB) Secretariat in coordination with ASEAN Secretariat will work with AMSs to conduct a mid-term review on the implementation of the ASEAN Integrated Food Security Framework and Strategic Plan of Action on Food Security (2015-2020). The Meeting took note that the existing five (5) agricultural commodities (rice, maize, soybean, sugar and cassava) currently being monitored by AFSRB adequately cover the key agricultural crops of significant value in food security of the ASEAN region.

15. As fiscal year 2017 marked the last year of the financial contribution to the Endowment Fund as committed in the ASEAN Plus Three Emergency Rice Reserve (APTERR) Agreement, the second phase of financial contribution will start from 2018 to 2022. To ensure continuous operation of APTERR, the Meeting agreed to sign the Protocol to Amend the APTERR Agreement, which will amend Attachment 2 on the Contribution to the APTERR Fund. The Protocol appears as **ANNEX 8**.

16. The Meeting noted the issues of MRLs on rice applied by the European Union (EU) that is stricter than Codex MRLs and agreed to send a letter to EU, signed by the AMAF Chair, to express concern on the application of stricter MRLs on rice.

17. The Meeting adopted the following documents:

i. Multi Sectoral Framework on Climate Change: Agriculture and Forestry towards Food and Nutrition Security and Achievements of SDGs (MSFCC) **(Appendix 2 of ANNEX 7)**
ii. Plan of Action of the ASEAN GMFNet (2018-2025) (**Appendix 3 of ANNEX 7**).
iii. Plan of Action of ASEAN Rapid Alert System for Food and Feed (ARASFF) 2018-2023 **(Appendix 4 of ANNEX 7)**
iv. Revised Rules and Procedures (RAP) of ARASFF (**Appendix 5 of ANNEX 7**)
v. Revised TOR and ROP of the ARASFF NCPs (**Appendix 6 of ANNEX 7)**
vi. Revised TOR of the ARASFF SC (**Appendix 7 of ANNEX 7**)

III. The Special Senior Officials Meeting of the 40th Meeting of the ASEAN Ministers on Agriculture and Forestry (Special SOM-40th AMAF) was held on 5-6 August 2019 in Hue City, Viet Nam

5.1 Cooperation in Food

5.1.1 Food Security

iii) Report of the 39th Meeting of the ASEAN Food Security Reserve Board (AFSRB)

11. The Meeting noted that the 39th Meeting of the ASEAN Food Security Reserve Board (AFSRB) will be held on 15-16 August 2019 in Bangkok, Thailand. The outcomes of the Meeting would be reported at the PrepSOM-41st AMAF in October 2019 in Brunei Darussalam.

Action Line: AFSRB Secretariat and AMS

iv) ASEAN Multi-Sectoral Framework on Climate Change: Agriculture and Forestry Towards Food Security (AFCC)

12. The Meeting adopted the Report of the 8th Meeting of the Ad-hoc Steering Committee on Climate Change: Agriculture and Forestry towards Food Security (AHSCCC-FS) held on 18-19 January 2019 in Lombok, Indonesia, which appears as **ANNEX 7**.

13. On the establishment of the permanent platform for the Multi-sectoral Framework on Climate Change: Agriculture and Forestry Towards Food and Nutrition Security and

Achievements of Sustainable Development Goals (MSFCC), the Meeting viewed that before a permanent platform is created, the AHSCCC-FS in consultation with ASEAN Secretariat need to ensure that the role of the Steering Committee does not overlap and duplicate with existing platforms so as to have a clear coherence on ASEAN mechanisms dealing with climate change. The Meeting noted Singapore and Malaysia's suggestion on the need for the AHSCCC-FS to consult with the ASEAN Working Group on Climate Change (AWGCC) and other environmental and climate change-related bodies in ASEAN on this matter.

14. The Meeting agreed to extend AFCC's mandate until 2030 to further collaborate with relevant sectoral bodies under ASEAN Three Pillars (AEC, ASCC and ASPC) in implementing the MSFCC.

Action Line: AHSCCC-FS and ASEAN Secretariat

5.2.1 Cooperation in Crops

31. The Meeting adopted the Report of the 26th Meeting of the ASEAN Sectoral Working Group on Crops (ASWGC) held on 3-5 July 2019 in Singapore, which appears as **ANNEX 17**.

33. Regarding the MRLs issue on rice applied by EU, since there were no issues with tricyclazole affecting rice trade between ASEAN and EU, the Meeting recommended AMAF that there is no necessity at this stage for ASEAN to send a letter to EU to express concern on the enforcement of European Commission Regulation (EU) 2017/983.

Action Line: SOM-AMAF Chair and ASEAN Secretariat

Action required:

The Meeting may wish to take note the outcomes of the SOM AMAF and AMAF Meetings in 2018-2019

ASEAN Integrated Food Security Framework and Strategic Plan of Action – Food Security (AIFS SPA-FS) 2015-2020 Midterm Evaluation

Presentation prepared by:

Roehlano M. Briones

Consultant, RECOFTC Center for People and Forests

Topics covered

- Recall: context and contents of AIFS-SPA-FS 2015-2020
- Progress: Dimensions and Objectives of food security
- Progress: Activities
- Assessment
- Recommendations

Context and content of SPA-FS 2015-2020

Background: AIFS-SPA-FS 2009 - 2014

- Achievements:
  - Entry into force of ASEAN Plus Three Emergency Rice Reserve (APTERR) Agreement
  - Initiative to support strengthening AFSRB
  - Preparation for self-sustained AFSIS
  - Strengthened cooperation with international institutions
  - Launch of ASEAN-US MARKET cooperation project
- Lessons learned:
  - Importance of identifying measurable outputs, outcomes, and impacts; as well as specific activities with deliverables
  - Implementation arrangement with focal points for accountability
  - Emphasis on regional cooperation
  - Focus on nutrition, food safety, and poverty alleviation

Contents of SPA-FS 2015-2018

- Endorsed at the 36th AMAF Meeting Nay Pyi Taw on September, 2014
- Continues:
  - Dimensions of food security (official definition of World Food Summit)
  - Goal (long-term food security and nutrition, improved livelihood of farmers)
  - Objectives:
    1. Sustain and increase food production
    2. Reduce postharvest losses
    3. Promote conducive market and trade for agriculture commodities and inputs
    4. Ensure food stability
    5. Ensure food safety, quality, and nutrition
    6. Promote availability and accessibility to agriculture inputs
    7. Operationalise regional food emergency relief arrangements

Contents of SPA-FS 2015-2018

Components → changes made in view of lessons learned

1. Food security and emergency/shortage relief

   Strategic Thrust 1 – Strengthen food security, including emergency/shortage relief arrangement

2. Sustainable food trade development

   Strategic Thrust 2: Promote conducive food market and trade

3. Integrated food security information system

   Strategic Thrust 3: Strengthen integrated food security information systems to effectively forecast, plan, and monitor supplies and utilisation for basic food commodities

Contents of SPA-FS 2015-2018

4. Agricultural innovation (NEW)

   Strategic Thrust 4: Promote sustainable food production

   Strategic Thrust 5: Encourage greater investment in food and agro-based industry

   Strategic Thrust 6: Identify and address emerging issues related to food security

5. Nutrition-enhancing agriculture development (NEW)

   Strategic Thrust 7: Utilise nutrition information to support evidence-based food security and agriculture policies

   Strategic Thrust 8: Identify policies, institutional and governance mechanisms for nutrition-enhancing agriculture development

   Strategic Thrust 9: Develop and strengthen nutrition-enhancing agriculture policies/programs and build capacity for their implementation, monitoring, and evaluation

Contents of SPA-FS 2015-2018

- Each Strategic Thrust:
  - Divided into Outputs
  - Outputs then correspond to one or more Activities
- For each Activity:
  - Deliverables with time frame
  - Identifies for each Output and Activity a Lead Agency; other responsible agencies; dialogue/development partners

Progress: Dimensions and Objectives

Dimensions of food security

AVAILABILITY:

Average dietary energy supply adequacy (%)

	2014-2016	2015-2017	2016-2018
Cambodia	109	109	109
Indonesia	123	125	126
Lao PDR	106	106	106
Malaysia	125	125	125
Myanmar	117	118	118
Philippines	117	119	120
Thailand	115	115	116
Viet Nam	124	126	126

Source: FAOStat.

- All above 100%
- Rising slightly over time

Dimensions of food security

ACCESSIBILITY:

Prevalence of undernourishment (%)

UTILISATION:
No recent figures available

	2014-2016	2015-2017	2016-2018
Cambodia	17.8	17.2	16.4
Indonesia	8.7	8.6	8.3
Lao PDR	16.8	16.7	16.5
Malaysia	2.8	2.6	2.5
Myanmar	11	10.6	10.6
Philippines	13.6	13.5	13.3
Thailand	7.9	7.8	7.8
Viet Nam	9.8	9.4	9.3

Source: FAOStat

- Similar trend as for availability

Goal: Improved livelihoods

Indicator:
Agricultural output per worker
(In US$, 2010 prices)

	2015	2016	2017	2018	Growth rate (%)
Cambodia	1,552	1,570	1,588	1,600	1.00
Indonesia	3,288	3,485	3,632	3,753	4.50
Lao PDR	771	778	787	791	0.82
Malaysia	16,593	17,008	18,112	17,884	2.53
Myanmar	1,587	1,625	1,690	1,710	2.52
Philippines	2,217	2,286	2,578	2,576	5.13
Thailand	2,948	3,036	3,163	3,340	4.26
Vietnam	1,037	1,100	1,166	1,210	5.28

Source: World Bank (2019).

- Increasing trend: rapid growth for Indonesia, Philippines, Thailand, Vietnam

Objectives

Increase agricultural production

Cassava output, in tons

	2015	2016	2017
Cambodia	9,090,587	9,830,665	10,577,812
Indonesia	21,801,415	20,744,674	19,046,000
Lao PDR	2,382,478	2,410,000	2,277,050
Malaysia	67,713	61,161	44,229
Myanmar	460,483	426,260	398,745
Philippines	2,710,919	2,755,146	2,807,671
Thailand	32,357,741	31,161,000	30,973,292
Viet Nam	10,740,000	10,909,800	10,267,568

Source: FAOStat.

Mostly negative: except for Cambodia, Philippines

Objectives

Increase agricultural production

Maize output, in tons

	2015	2016	2017
Cambodia	400,000	663,000	750,000
Indonesia	19,612,435	23,578,000	27,952,000
Lao PDR	1,516,250	1,552,360	1,192,525
Malaysia	62,460	64,867	72,561
Myanmar	1,748,500	1,830,631	1,909,334
Philippines	7,518,756	7,218,817	7,914,909
Thailand	4,729,527	4,824,669	4,961,580
Viet Nam	5,287,261	5,244,140	5,109,766

Source: FAOStat.

Mostly increasing (except Viet Nam)

Objectives

Increase agricultural production

Paddy rice output, in tons

	2015	2016	2017
Cambodia	9,335,000	9,952,000	10,350,000
Indonesia	75,397,841	79,355,000	81,382,000
Lao PDR	4,102,000	4,148,800	4,039,779
Malaysia	2,741,404	2,739,606	2,901,894
Myanmar	26,210,318	25,672,832	25,624,866
Philippines	18,149,838	17,627,245	19,276,347
Thailand	27,702,191	26,652,995	33,383,382
Viet Nam	45,090,562	43,112,010	42,763,682

Source: FAOStat.

Mostly increasing (except Myanmar, Lao PDR)

Objectives

Increase agricultural production

Soybean

	2015	2016	2017
Cambodia	162,000	162,000	168,000
Indonesia	963,183	860,000	542,000
Lao PDR	18,675	19,130	7,960
Myanmar	154,300	149,185	209,470
Philippines	545	544	666
Thailand	56,963	52,000	54,000
Viet Nam	146,341	160,696	101,856

Source: FAOStat

Some contracting, with sharp declines (Indonesia, Lao PDR, Viet Nam)

Objectives

Increase agricultural production

Sugarcane

	2015	2016	2017
Cambodia	609,962	648,234	686,505
Indonesia	25,348,720	23,324,970	21,212,950
Lao PDR	2,018,655	2,019,000	1,764,390
Malaysia	30,271	28,038	29,990
Myanmar	10,142,400	10,437,058	10,370,042
Philippines	22,926,437	22,370,546	29,286,893
Thailand	94,138,465	90,089,634	102,946,001
Viet Nam	18,337,227	16,313,145	18,356,398

Source: FAOStat

Mixed

Objectives

To reduce postharvest losses: no data available

To promote conductive markets and trade:

Share of ASEAN in agricultural exports & imports (%)

In exports:

	2015	2016	2017	2018
Brunei Darussalam	90.3	57.8	69.6	29.8
Cambodia	5.3	9.0	8.6	
Lao PDR	71.9	65.8		
Indonesia	17.1	19.6	19.3	17.8
Malaysia	24.7	25.9	27.4	27.1
Myanmar	43.7	41.5	37.7	39.6
Philippines	7.0	10.2	10.9	9.0
Singapore	10.4	9.4	9.1	8.5
Thailand	22.6	24.9	27.5	26.4
Vietnam	13.7	14.0	11.4	10.8

Source: Trademap (www.trademap.com)

Objectives

To promote conductive markets and trade:

Share of ASEAN in agricultural exports & imports (%)

No clear trend over time

In imports:

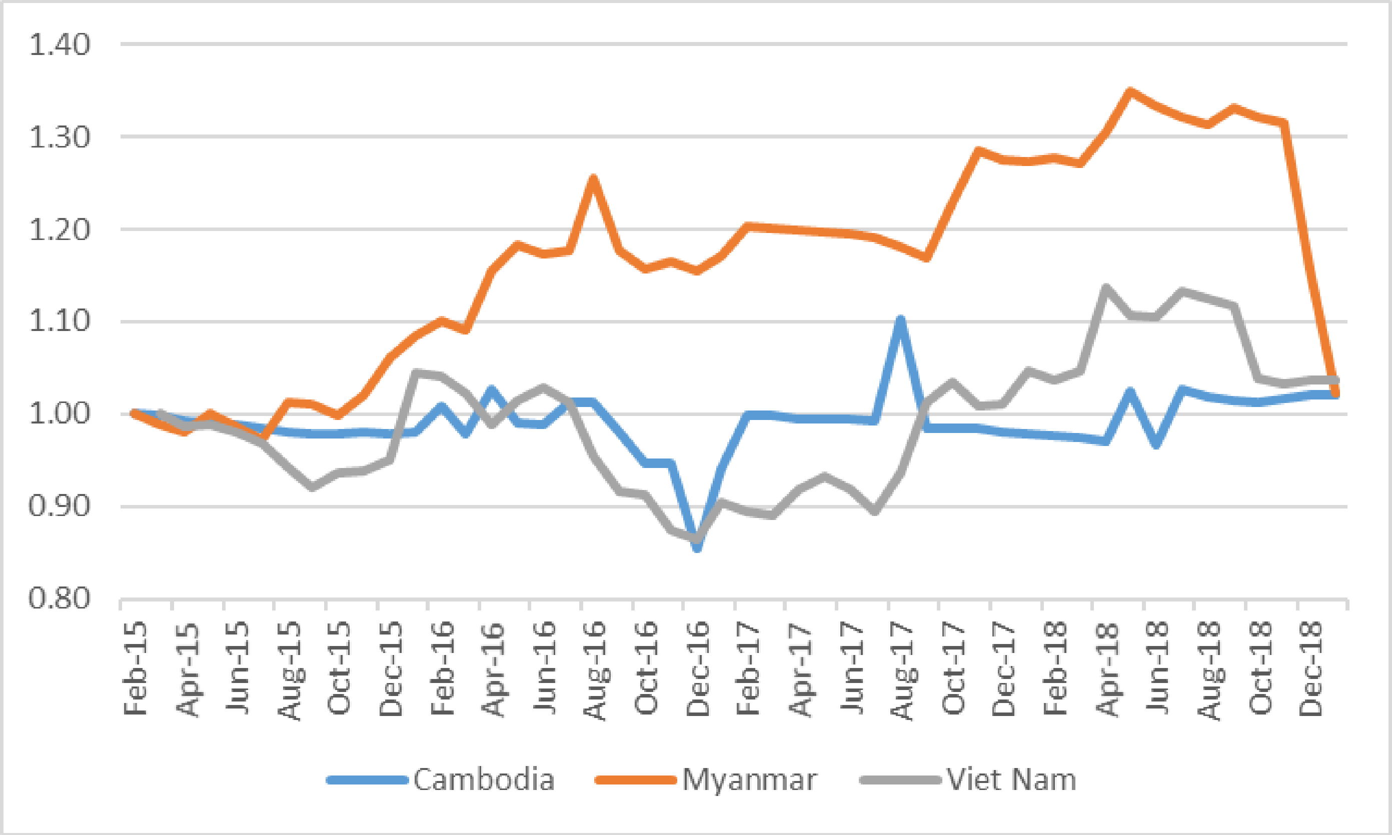
	2015	2016	2017	2018
Brunei Darussalam	49.1	43.0	48.4	43.2
Cambodia	30.1	33.7	37.2	
Lao PDR	75.8	74.7		
Indonesia	28.6	27.3	25.7	25.0
Malaysia	29.8	32.2	28.9	29.1
Myanmar	77.5	75.1	51.0	54.0
Philippines	24.3	26.2	26.1	24.9
Singapore	34.6	34.1	33.3	30.9
Thailand	3.4	3.5	3.5	3.4
Vietnam	19.6	19.4	20.7	22.9

Source: Trademap (www.trademap.com)

Objectives

To ensure stability of food supply and prices:

Monthly domestic rice price index (January 2015 = 1.00)

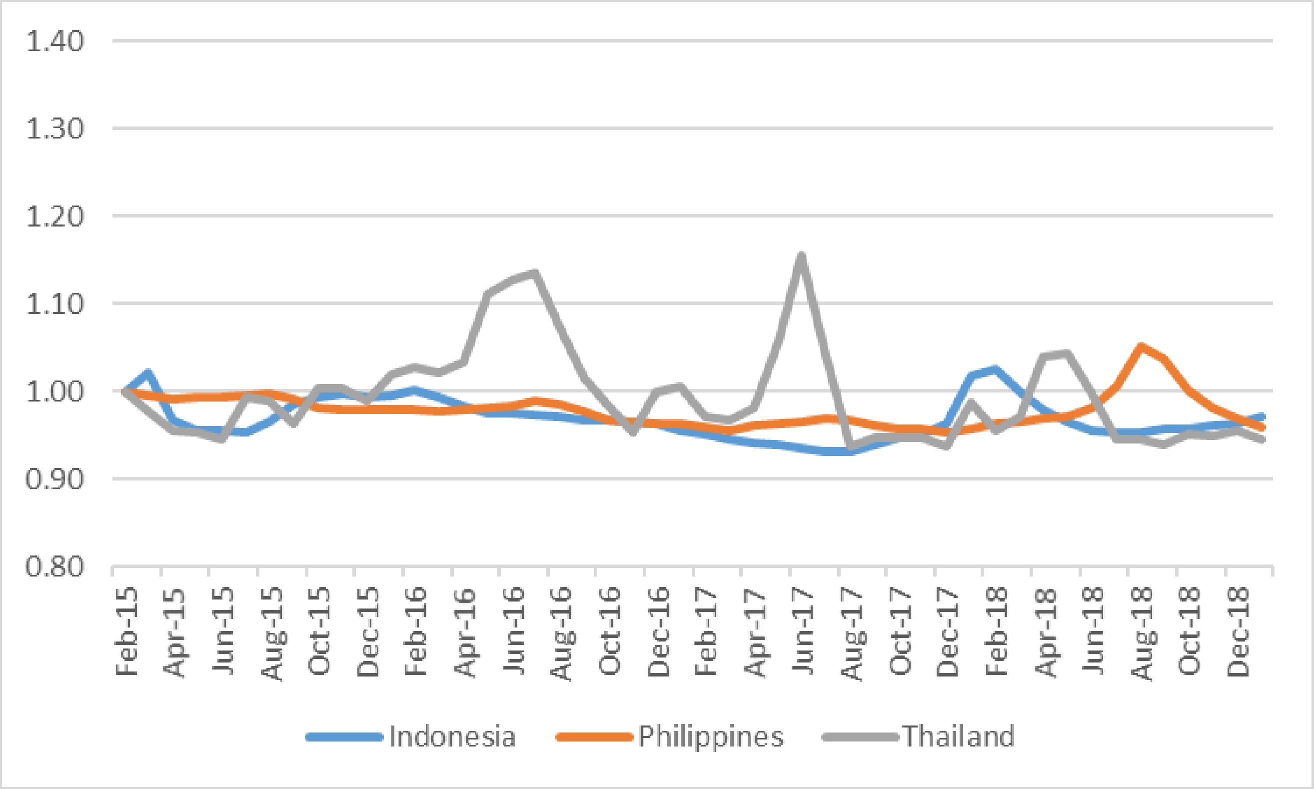


Source: FAO (2019).

Objectives

To ensure stability of food supply and prices:

Monthly domestic rice price index (January 2015 = 1.00)



Source: FAO (2019)

Progress: Activities

Source of information

- Two questionnaires were circulated last July 15: i) for Secretariats of ASEAN/ASEAN bodies; ii) for AMS
- For i): received back from ASEAN Secretariat, APTERR Secretariat, AFSRB Secretariat
- For ii): received back from Philippines (APTERR Council Member)

Progress to date

1.1. Regional food security reserve fully function	1.1.1. Meetings on country-specific implementation	2017	Philippines: NFA and MAFF-Japan, Roundtable on Tier 1 implementation
	1.1.2. Gather supporting data	2017	
	1.1.3. Assist countries in country-specific mechanism	2017	
	1.1.4. Capacity building activities	2020	None
	1.1.5. AFSIS-FEMI collaboration	2020	APTERR uses AFSIS publications
	1.1.6. Possibility study	2016	None

Progress to date

Output	Activity	Timeline	Accomplishment
1.2. Sustainability of the food supply chain with enhancement to seed industry	1.2.1. Technical meetings ASEAN Seed Council (ASC)	2017	ASC Preparatory Meeting 17-18 July, 2019, Putrajaya, Malaysia
	1.2.2. Gather supporting data	2017	
	1.2.3. Assist countries in country-specific mechanism	2017	
	1.2.4. Capacity building activities	2020	
	1.2.5. Seed information sharing platform	2020	
	1.2.6. Facilitate cooperation among industry players	2020	
	1.2.7. Harmonised rules on seed industry in ASEAN	2020	

Progress to date

Output	Activity	Timeline	Accomplishment
2.1. Regional food trade distributing more diverse and affordable food at more stable prices	2.1.1. Convene Food Trade Forum	2018	24-25 November 2015; Thailand hosts biennial Rice Convention since 2001 (latest in 27-29 May, 2019)
	2.1.2. Preparatory technical meetings	2018	
	2.1.3. Gather supporting data	2018	
	2.1.4. Submit recommendations to AFSRB	2018	
	2.1.5. Convene seafood forum	2020	
2.2. Enhanced AFSRB capacity	2.2.1. Capacity building activities	2020	

Progress to date

Output	Activity	Timeline	Accomplishment
3.1. AFSIS a permanent body	3.1.1. AFSIS as a permanent functioning system	2017	Steps taken (but specifics not available)
	3.1.2. Collect, update data on regular basis	2020	On-going (AFSIS publications; latest is EWI March 2019)
	3.1.3. Timely, periodic assessment of key commodities	2020	
	3.1.4. Develop standards and best practices for FSIS	2020	

Progress to date

Output	Activity	Timeline	Accomplishment
4.1. R&D outputs disseminated	4.1.1. Create and use technology portal	2017	Not yet done
	4.1.2. Cooperation for commodity development plans	2020	
	4.1.3. Cooperation re planting materials and extension	2020	
	4.1.4. Technologies/techniques to reduce postharvest losses	2020	
	4.1.5. Coordinate R&D and commercialisation for seed sector	2020	
	4.1.6. Promote R&D for alternative source of fish meal	2020	
	4.1.7. Expand farmers' knowledge to include agribusiness	2020	

Progress to date

Output	Activity	Timeline	Accomplishment
5.1. Sustained expansion of investments in food and agri-based industry	5.1.1. Prepare roadmaps for food regional value chains	2017	
	5.1.2. Promote public-private sector partnership	2020	
6.1. Implications of bio-en	6.1.1. Conduct study on bio-energy and food security	2020	Not yet done
6.2. Climate-smart agricult	6.2.1. Pilot testing of climate-smart technologies, practices	2020	

Progress to date

Output	**Activity**	**Timeline**	**Accomplishment**
7.1. Key nutrition informat	7.1.1. Conduct regional workshops	2020	
7.2. Nutrition information	7.2.1. Conduct a study	2020	
7.3. Utilisation of information in policies	7.3.1. Strengthen AFSIS with nutrition information	2020	
	7.3.2. Develop nutrition-enhancing policy briefs	2020	Not yet done

Progress to date

Output	Activity	Timeline	Accomplishment
8.1. Awareness on importance of nutrition among stakeholders	8.1.1. Develop, distribute awareness-raising materials	2020	
	8.1.2. Conduct of events for awareness-raising	2020	
8.2. Policies and mechanisms supported	8.2.1. Annual consultation, SOM-AMAF and other sectoral bodies	2020	Not yet done
	8.2.2. Facilitate policy dialogue on food security and nutrition	2020	
	8.2.3. Establish strategic partnerships	2020	

Progress to date

9.1. Nutrition-enhancing policies and programs developed	9.1.1. Develop capacity to mainstream nutrition	2020	
	9.1.2. Conduct studies to enhance capacity	2020	
	9.1.3. Develop policy guidelines and tools	2020	ASEAN Regional Guidelines on Food Security and Nutrition Policy endorsed by 39th AMAF in September 2017, Chiang Mai, Thailand.
9.2. Capacity for M&E developed	9.2.1. Develop policy guidelines, tools	2020	
	9.2.2. Build capacity on implementation, M&E	2020	
9.3. Nutrition-enhancing rograms subjected to M&E	9.3.1. Identify, implement priority actions, including M&E	2020	

Assessment and way forward

Summary of findings

- Dimensions and objectives:
  - Continuous progress on availability, accessibility (where data available)
  - No serious issues re stability (except rice prices in Myanmar)
  - Mixed trends in production of major crops, share of ASEAN in agricultural trade of AMS
- For SPA-FS 2015-20: Activities now framed by deliverables
- However: lack of information makes it difficult to form a complete picture of accomplishments of SPA-FS 2015-2018 to date

Summary of findings

Based on available information: some of the Activities on track, namely:

- APTERR – use AFSIS information for FEMI; country-specific mechanism (Philippines)
- AFSRB – Food Trade Forum (1x in 2015); Biennial Rice Convention (existing event hosted by Thailand)
- ASEAN Seed Council – preparatory meeting already held
- AFSIS – steps taken to establish permanent mechanism

However, no activities → technology portal, study on emerging issues, nutrition-enhancing briefs, SOM-AMAF consultation with other ASEAN bodies

Recommendations

Dimension and objectives

- Continue to monitor → key role of information (AFSIS, other ASEAN bodies on food security) for crisis preparedness

Activities:

- Need to obtain more information
- Accountability is often assigned at a high level (AMAF, etc.) → recheck if TWG or Expert Group can identified as responsible agency

Recommendations

- Need to catch up on items for which there is definitely no movement
- OR: reconsider and re-calibrate some of the activities and outputs – re those that cannot be realistically done within the next year
- ALTERNATIVELY: in view of continuing challenges (and SDG goal of achieving zero hunger in the region by 2030) → 3rd phase of SPA-FS to end 2025 (coinciding with Vision and Strategic Plan for Food, Agriculture, and Forestry) → continue activities and outputs that will not be completed by 2020

Review of the World Food Situation

Food market in 2019/20 are bracing for some additional uncertainties beyond their own fundamentals. A fast-changing trade environment and the rapid spread African Swine Fever constitute important challenges to overcome. However, prospects point to generally well supplied markets, which is seen to contribute to a lower food import bill in 2019.

1. RICE

1.1Production

According to FAO and USDA published in July 2019, less attractive margins and adverse weather are tentatively forecast to limit world rice production. The prediction of world rice production in 2019/2020 is around 516.80 million tons, unchanged from a year earlier.

In Asia, the aggregate rice output is predicted to rise in 2019. A large proportion of this year-on-year increase is expected to come from India. Similarly, the outputs are anticipated to increase in Bangladesh, Indonesia, Sir Lanka and Thailand. In China, rice production is expected to decrease for the second consecutive year as farmers replace some paddy cultivation with more profitable crops.

In other regions, the rice production outlook is negative for the USA, where poor price prospects are expected to result in output falling. In Africa, rice output is forecast to decline in Nigeria, Mali and Egypt due to a combination of dry weather conditions and cyclone-induced floods.

1.2Consumption

World rice consumption in 2019/2020 is forecast to reach an all-time high of 518.5 million tons, up 1.4 percent from 2018/19. Taking population growth into account, this level would be sufficient to lift rice per capita food use globally to 54.3 kg, up from 53.9 kg the previous season. From a regional perspective, the increase would reflect expectations of food intake growth in Asia and food demand is also anticipated to remain strong in Africa.

1.3Stocks

World rice stocks at the close of 2019/20 are forecast to fall 1 percent below the record high of 2018/19 to 178.7 million tons. This volume would still represent the second highest reserve level on record. Much of the forecast decline in global carry-overs is anticipated to be concentrated in China, where the government has signaled their intention to intensify steps to address the supply overhang caused by successive large crops and import.

1.4Trade

International rice trade in 2019/20 is predicted to fall 1.5 million tons to 46.8 million tons below the 2018 record level. The contraction is expected to be demand-driven and concentrated in the Far East.

Individually, Bangladesh and Indonesia would be responsible for much of the region's import decline, as ample local inventories should preclude the need to resort to large import, as in 2018. Combined with expected import declines in China, and Sri Lanka, this would offset expected increases elsewhere, namely Malaysia, Singapore and the Philippines.

Elsewhere, import demand, primarily for fragrant varieties, is expected to remain strong in the USA and the EU, even if in the latter, higher tariffs on selected classes of import from Cambodia and Myanmar. Moreover, import by Nigeria, the world's second largest rice importer once more, raising 2019 purchases to around 2.4 million tons.

On the 2019/20 exports side, prospects of subdued global demand are anticipated to reduce export prospects for Thailand more than any other country, as this would compound a second successive season of fragrant rice output shortfalls, a stronger currency and intense competition for markets. By contrast, Cambodia, China and the USA could all see their shipments rise, while Pakistan replicates its robust 2018 export performance. A competitive advantage in the parboiled and aromatic segments could likewise help shipment from India to recover. This, however, assumes that the announced United States of America withdrawal of sanctions waivers for buyers of Iranian oil do not undermine the rupee payment mechanism, through which transactions with Iran, one of India's largest basmati destinations, are being settled. The export outlook is also positive for Vietnam, given competitive prices and expectations of further forays into the Japonica and aromatic segments.

1.5Prices

International rice prices have made steady inroad since late 2016. Price Increases have particularly affected the most widely traded Indica varieties despite currency depreciations in various exporting countries.

2. SUGAR

2.1Production

According to the USDA's figures, world sugar production is estimated to reach 179 million tons, down 8 percent from the 2017/18 record crop due to unfavorable weather conditions and a decline in planted area in key producing countries, the most notable case being Brazil.

For the 2019/20, world sugar production is forecasted up 2 million tons to 181 million tons as higher production in Brazil and the EU more than a decline in India.

2.2 Consumption and Stock

World sugar consumption in 2019/20 is projected at 176.45 million tons, up 1.4 percent from 2018/19 due to growth in markets such as Egypt, India, Indonesia, and Pakistan. However, in the EU, consumption is projected to be slightly lower as EU domestic sugar consumption has been stagnating for the last few years. Consumer preference for lower sugar-containing diets has encouraged food processors to reformulate products.

As a result of expected consumption outpacing production in 2019/20, world ending stocks of sugar are predicted to fall from 51 million tons in 2018/19 to 48 million tons, especially in China, stocks are expected to fall for a fifth consecutive year because of the gap between domestic consumption and production.

2.3Trade

World import volume in 2019/20 is little changed overall at 51.32 million tons. A key feature of international sugar trade is the greater availability of supplies in the traditional largest importers, including China, Indonesia and the USA. Moreover, sugar imports by Indonesia are set to remain strong, underpinned by robust domestic demand, especially from the beverage and food processing industries.

On the export side, total world export for 2019/20 is forecast at around 58 million tons, up 2.3 percent increase from 2018/19. Brazil is expected to remain the largest and most influential exporter on the global market, with export projected at 20.85 million tons for 2019/20, up 6 percent from the previous year. Although Brazil significantly reduced its exports in 2018/19 due to low global prices and reduced import demand, Brazil is expected to account for 36 percent of global exports in 2019/20 and still the dominant player in global trade. Thailand is projected to export 11.9 million tons, more than 20 percent of global trade. For India, the fourth largest exporter, are expected its export to rebound from 3.4 million tons to 3.5 million tons, with total exports expected to include 1 million tons of sugar re-exported under the Advance Authorization scheme and the remaining 2.5 million tons as commercial sales.

2.4 Prices

The international prices of sugar over the period January – April 2019, prices were down 3.2 percent compared to the same period in 2018. Reports of large exportable surpluses in India and Thailand, coupled with greater production in traditional sugar importing countries, have put further downward pressure on

international prices so far in 2019. Moreover, a reduction in sugar production in Brazil, as well as, expectations of higher imports by China, was not sufficient to reverse the tendency of falling prices. At these current levels, international sugar prices are below production costs for the vast majority of world producers, including Brazil. And at the same time, the rate of consumption growth that could lift prices is not happening, due to the structural changes taking place on the demand side of the market.

Nonetheless, preliminary indications for the 2019/20 season suggest that world sugar consumption will surpass production, though by a relatively small margin, after two consecutive years of a production surplus. This could help to bring about a more balanced market form the start of next season.

3. MAIZE

3.1 Production

World maize production for 2019/20 is forecast to decrease to 1,099 million tons, down 2 percent from 2018/19, with a cut in the forecast for China outweighing a notable increase in Argentina. In southern hemisphere, harvest is continuing in Argentina and Brazil with a bumper production forecast. In the northern hemisphere, North America is suffering from cool-wet conditions delaying sowing and emergence, while conditions in Europe are mostly favorable.

3.2 Consumption/Stocks

World total consumption in of maize in 2019/20 is forecast to reach 1,134 million tons, lowered on slower rise of feed and industrial use, especially in Brazil where more supplies are destined for export.

China is anticipated to use more maize for feeding in 2019/20. However, the increase is expected to remain small and that after the 2018/19 stagnated level.

World maize inventories in 2019/20 are expected to decrease to 291 million tons, down nearly 12 percent from 2018/19. A continued drawdown of maize inventories in China accounts for the bulk of this decrease. China’s maize stocks are forecast to decline almost 12 million tons or 6 percent from their opening levels. Maize inventories in the USA could also be heading for a decline in 2019/20. Despite the anticipated rise in domestic production, stronger prospects for exports combined with higher domestic utilization could bring USA maize stocks down nearly 5 million tons, or 9 percent below their opening levels.

3.3 Trade

According to the USDA’s figures, global import volume in 2019/20 is expected to 167.06 million tons, up nearly 2 percent from 2018/19. Total maize imports by the EU in 2019/20 could fall by at least 4 million tons or 19 percent.

This decline would be largely due to substantial carry-over stocks from the current season. By contrast, in Asia, total maize imports are set to rise for the third consecutive season such as Iran, Turkey and Vietnam, reflecting growing feed demand in those countries. Predicted maize imports in Africa would also be higher than 2018/19 and in Lain America and the Caribbean; maize imports are expected to be broadly in line with 2018/19, with higher purchases by Mexico and Peru, despite a probable rise in this year's production. Strong feed sector demand continues to underpin large purchases of such countries.

Global Export Volume in 2019/20 is predicted to decline at about 171.61 million tons, down 0.7 percent from the previous year. Brazil is projected to remain the largest exporter of maize with 34 million tons followed by Argentina, Ukraine and Russia. The year-on year fall in exports is forecast for Argentina and Ukraine where, due to the anticipated decline in domestic production this year.

3.4 Prices

Despite some tightening of the supply and demand balance during the 2018/19 season, international prices remained generally under downward pressure. With demand still absorbing record supply, it is expected to see higher corn price in 2019.

4. SOYBEAN

4.1 Production

According to USDA's figures, global soybean production in 2019/20 is projected to decrease at about 347 million tons, down 4.36 percent from last year. This decrease primarily reflects a reduction in planted area and return to trend yield in the USA. The reduced area is in response to low prices, high carry-over, weather issues and uncertainty over trade with China. Production increases are expected in Brazil, China and India as increase in harvested area.

Soybean consumption, representing 60 percent of the oilseed sector, will continue to be the driving force in total volume growth.

4.2 Stock

Global 2019/20 soybean ending stocks are decline to 104.53 million tons, down 7.5 percent from last year due to the reduction stocks in Argentina and China. Even the global stock will fall slightly but will remain at a healthy level.

4.3 Trade

USDA projects global soybean imports for 2019/20 to rise at a record 150.82 million tons, up 3.5 percent from 2017/2018 in line with growing protein feed demand. China is projected to remain the world's largest importer of soybean, accounting for nearly 58 percent of global trade and expect to import up to 87 million tons. In the EU, the world's second largest buyer is projected to fall to 15.10 million tons.

Forecasted global soybean exports for 2019/20 are increased to 151.05 million tons, up 0.6 percent from last year. Brazil and USA will continue to be the main global soybean suppliers accounting for nearly 85 percent of global trade. Brazil is expected to be the leading soybean exporter in 2019/20 in response to a larger projected harvest and preferential access to China. Given that the USA – China trade negotiations are still ongoing, forecast to contract for the second consecutive year. Argentina continues to expand exports following the reduced meal output corresponding with the 2017/18 drought and boosting its global export share.

4.4 Prices

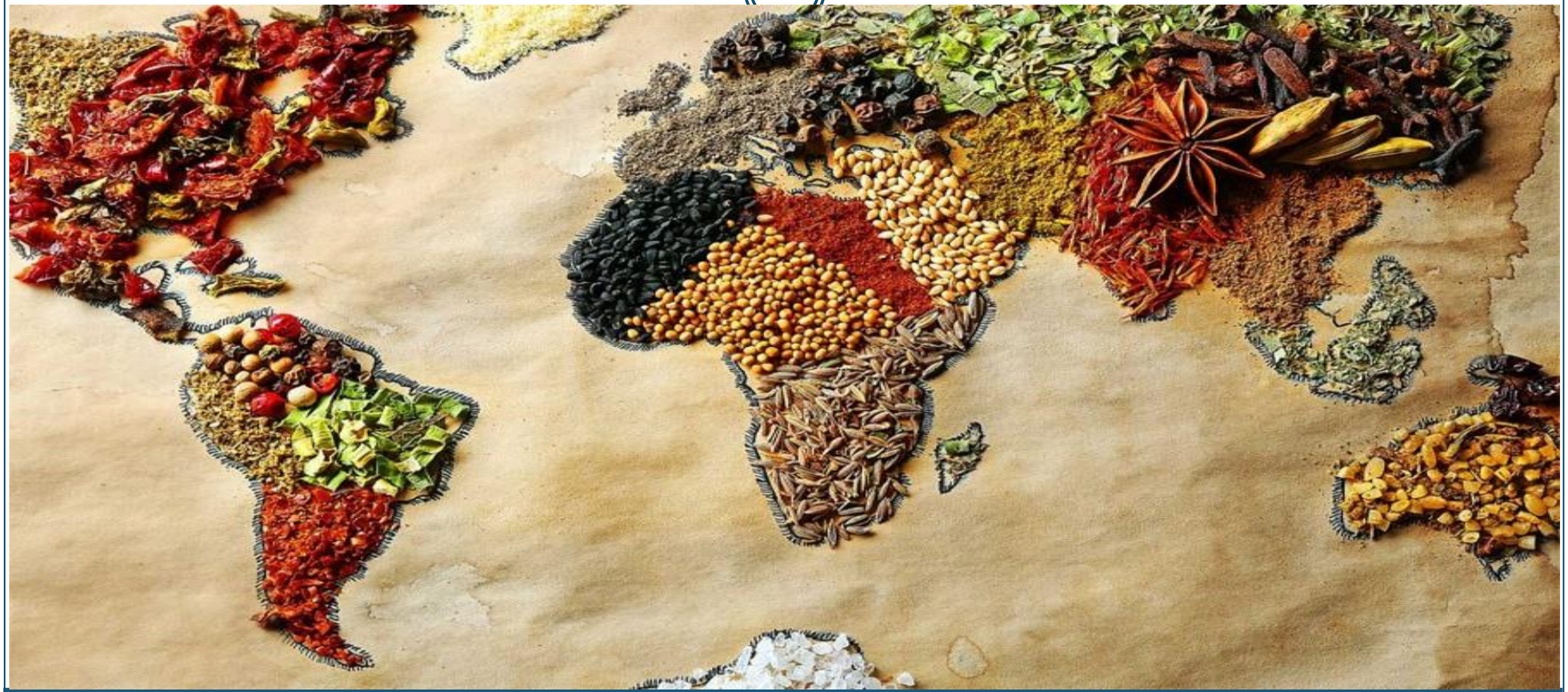
The course of the oilseed price index largely reflects developments in the global soybean market. After the sharp decline experienced towards the end of the 2017/18 season, soybean price stabilized, fluctuating within a relatively narrow range until April 2019. On the other hand, forecasts of record global production, combined with signs of subdued import demand and the ensuring prospects of a massive build-up in inventories, kept prices under pressure. On the other, as the crop season gradually unfolded in the southern hemisphere, reports of unfavorable weather in parts of South America provided sporadic support to soybean prices. Moreover, the prolonged USA-China trade negotiations affected market sentiment.

AFSRB SEC.

August 2019

The 39th AFSRB Meeting

Review of the World Food Situation



Highlight

- Food Markets in 2019/20 are bracing for some additional uncertainties beyond their own fundamentals .
- A fast-changing trade environment and the rapid spread of African Swine Fever Constitute important challenges to overcome.
- Prospects point to generally well supplied markets, which is seen to contribute to a lower food import bill in 2019.

Global Rice Situation

Unit: Million Tons

	2017/18	2018/19	2019/20 *F'cast*	Change 18/19 19/20
Production	509.9	516.9	516.8	0.0
Consumption	507.3	511.2	518.5	1.4
Ending Stocks	174.0	180.6	178.7	-1.0

Source: Food and Agriculture Organization of the United Nations (FAO)

- Global rice production 2019/20 is forecasted at **516.8** million tones, **virtually unchanged** from the 2018
- Increase in India, Bangladesh, Indonesia, Thailand and Sri Lanka
- Decrease in China
- Taking population growth into account

Figure 3. Global paddy production and area

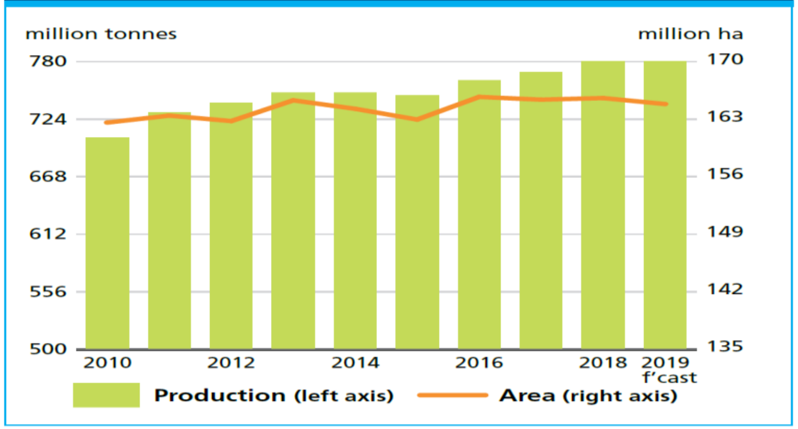
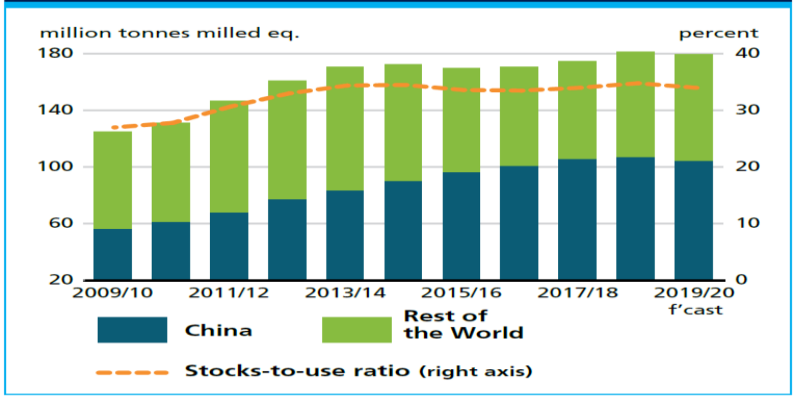


Figure 7. Global closing stocks and stocks-to-use ratio



Source: Food and Agriculture Organization of the United Nations

Global Rice Situation

World Rice Trade

Unit: Million Tons

	2017/18	2018/19	2019/20	%Change 19/20
Trade	48.3	46.8	48.9	4.5

- World rice trade in 2018/19, down 1.5 million tones from the previous year
- Reduced Far Eastern demand to depress world rice trade in 2019.
- World rice trade in 2019/20, rise to 48.9 million tons, up 4.5 % from 2018/19.
- Lower imports by China are mostly offset by higher imports by Egypt and the Philippines.

Figure 4. Rice imports by region

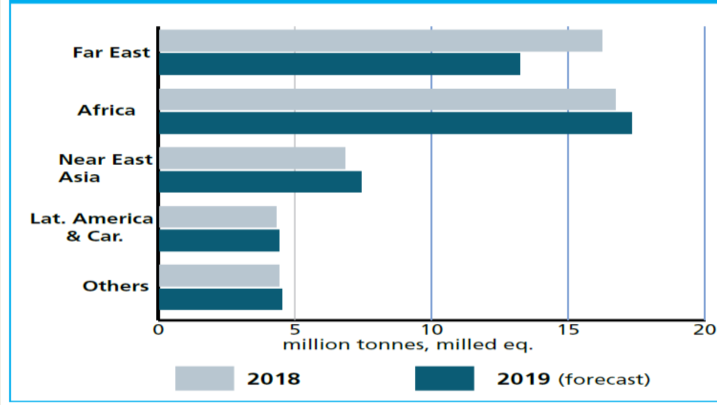
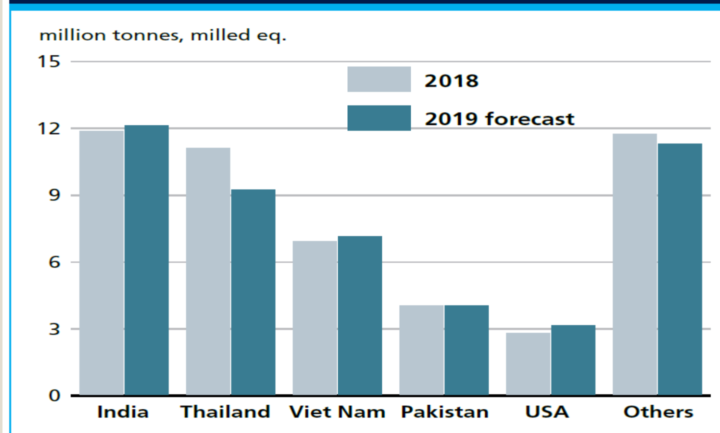


Figure 5. Rice exports by the major exporters



Source: Food and Agriculture Organization of the United Nations

Global Rice Situation

World Rice Import & Export

Unit: Million Metric Tons

	2017/18	2018/19	2019/20 (June)
Major Importers			
China	4.50	3.50	3.50
Philippines	2.50	3.00	2.70
Nigeria	2.10	2.20	2.40
EU	1.92	2.00	2.00
Cote d'Ivoire	1.50	1.60	1.60

	2017/18	2018/19	2019/20 (June)
Major Exporters			
India	11.79	12.00	12.00
Thailand	11.06	9.80	11.00
Vietnam	6.59	6.50	6.50
Pakistan	3.91	4.00	4.00
USA	2.76	3.00	3.18

Source: United States Department of Agriculture (USDA)

Global Rice Situation

Global Rice Price

- International rice prices recover, but increases capped by subdued Indica demand
- Since hitting a 14-month low in November 2018, international rice prices have tended to move up.
- The increase was driven by a rebound in medium/short grain quotations, sustained by Asian import tenders.
- A stronger Thai baht and general inflationary pressure in Pakistan have likewise underpinned a 5.2 percent rebound in the Aromatic Indix.

Figure 1. FAO all rice price index

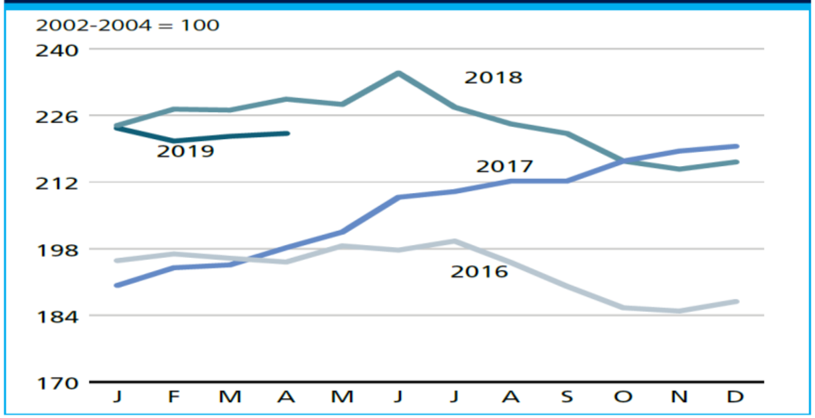
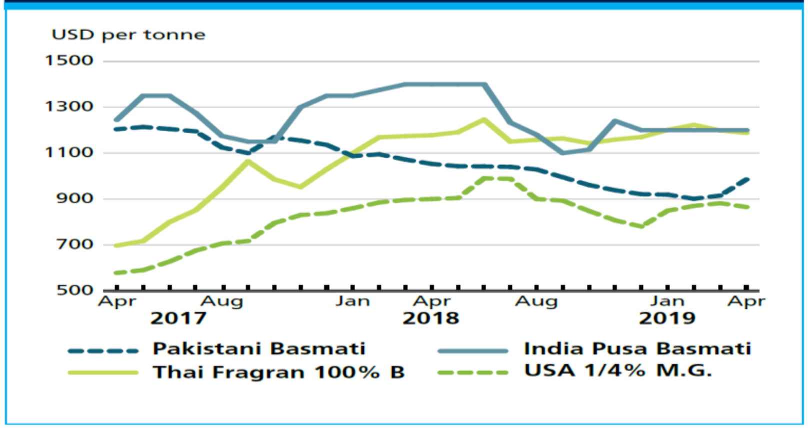
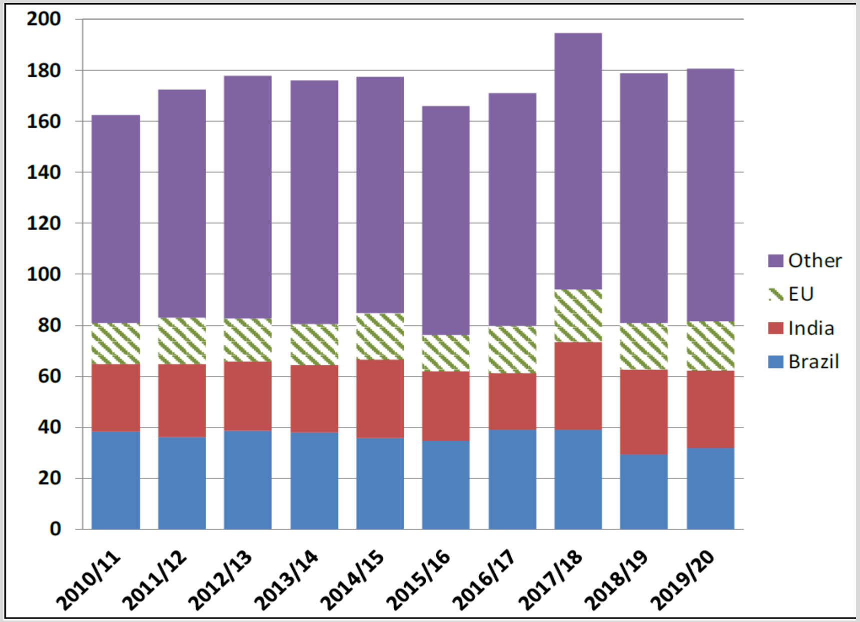


Figure 2. Export prices of Aromatic and Japonica rice



Global Sugar Situation



Unit: Thousand Metric Tons

	2017/18	2018/19	2019/20 (May)
Production	194.50	178.93	180.73
Consumption	173.58	173.95	176.45
Ending Stock	52.25	50.90	47.84

- Global production in 2019/20 is up 2 million tons to 181 million tons.
- Higher production in **Brazil and the European Union** more than offset decline in **India**
- Sugar consumption is up to 176 million tons due to growth in markets such as **Egypt, India, Indonesia** and **Pakistan**.
- Stocks in **China** are expected to fall for a fifth consecutive year because of the gap between domestic consumption and production.

Source: United States Department of Agriculture (USDA)

Global Sugar Situation

Global Sugar Import

Unit: Million Metric Tons

	2017/18	2018/19	2019/20 (May)
Indonesia	4.30	4.86	4.50
China	4.35	4.30	4.30
USA	2.97	2.59	2.92
Algeria	2.35	2.40	2.42
Bangladesh	2.65	2.33	2.38
World Total	54.69	51.07	51.32

Source: United States Department of Agriculture (USDA)

- Global Import Volume in 2019/20 are little changed overall at 51.32 million tons.
- Indonesia is projected to be the largest importer of sugar followed by China, USA, Algeria and Bangladesh
- Import increase in USA, Algeria, Bangladesh, Malaysia, UAE etc.
- Import increase in USA at 2.9 million tons based on projected quota programs and the calculation of US needs and defined in the amended Suspension Agreement.

World Sugar Situation

Global Sugar Export

Unit: Million Metric Tons

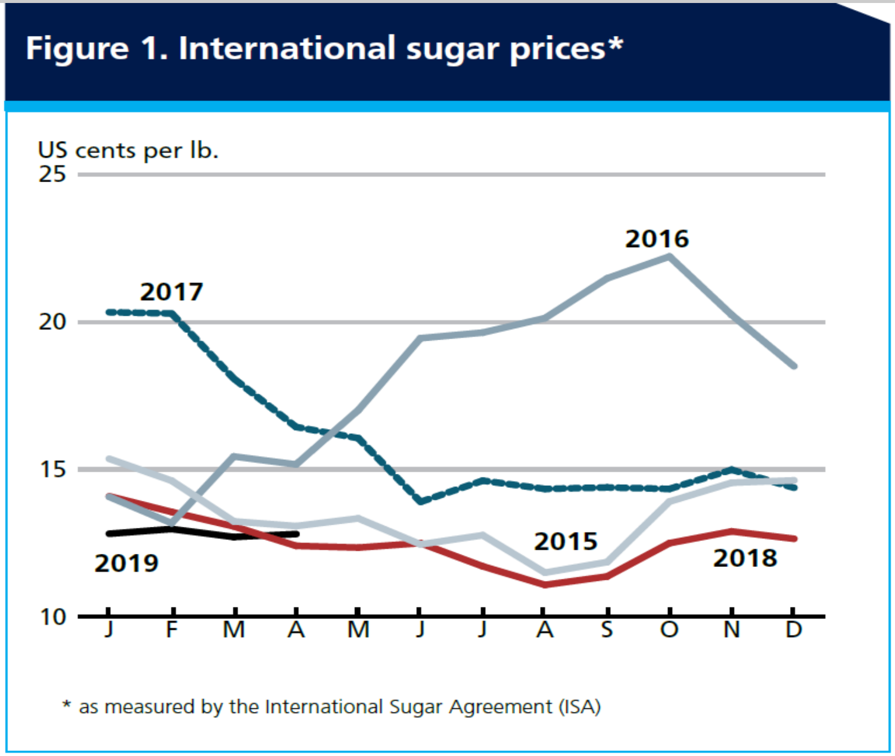
	2017/18	2018/19	2019/20 (May)
Brazil	28.20	19.60	20.85
Thailand	10.91	11.50	11.90
Australia	3.80	3.80	3.80
India	2.24	3.40	3.50
EU	3.92	2.00	2.40
World Total	64.50	56.44	57.73

Source: United States Department of Agriculture (USDA)

- With high demand, global export in 2019/20 are forecast up to 57.73 million tons
- Brazil remains the largest exporter of sugar followed by Thailand, Australia and India.
- Exports are up with the higher production in Brazil and Thailand and exports of India increases due to sugar re-exported under the Advance Authorization scheme

Global Sugar Situation

Global Sugar Price



Source: Food and Agriculture Organization of the United Nation (FAO)

- Large exportable surpluses in **India** and **Thailand**, couple with greater production in traditional sugar importing countries, put further downward pressure on international prices so far in 2019
- International sugar prices are below production costs for the vast majority of world producers, including **Brazil**.
- World sugar consumption in 2019/20 will surpass production, this could bring about more balanced market from the start of next season.

Global Maize Situation

Unit: Million Metric Tons

Subject	2017/18	2018/19	2019/20 (f'cast)
Production	1,077.98	1,120.47	1,099.19
Consumption	1,090.19	1,134.34	1,134.05
Stocks	339.30	328.75	290.52

Source: United States Department of Agriculture (USDA)

Global Maize Production

- Global maize production forecast for 2019/20 lowered with a cut in the forecast for China
- North America is suffering from cool-wet conditions, while conditions in Europe are mostly favorable.

Global Maize Consumption

- Total use of maize is projected to reach 1,134 million tons.
- Global consumption in 2019/20 lowered on slower rise of feed and industrial use, especially in Brazil

Global Maize Stock

- Global stock is expected to decrease in 2019/20 to 291 million tons.
- Stocks for 2019/20 are reduced for Argentina and China offsetting higher stocks for USA.

Global Maize Situation

Global Maize Import

Unit: Million Metric Tons

	2017/18	2018/19	2019/20 (f'cast)
World	149.94	164.14	167.06
Major Importer			
EU	18.47	23.50	20.00
Mexico	16.13	17.50	18.50
Japan	15.67	15.50	15.60
South Korea	10.02	10.20	10.50
Egypt	9.46	9.70	10.00

Source: United States Department of Agriculture (USDA)

- Projected 2018/19 world's import is raised to 155.58 million tons.
- The biggest importer is the EU followed by the Mexico, Japan and South Korea.
- In Asia, total maize import are set to rise. Maize imports by Iran, Turkey and Vietnam are forecast to increase
- In Africa would also be higher than in 2018/19 and in Lain America, higher purchases by Mexico and Peru

Global Maize Situation

Global Maize Export

Unit: Million Metric Tons

	2017/18	2018/19	2019/20 (f'cast)
World	148.82	172.80	171.61
Major Exporter			
Brazil	25.12	34.00	34.00
Argentina	22.50	34.00	33.50
Ukraine	18.04	29.50	27.00
Russia	5.53	3.00	5.00
South Africa	2.07	1.00	1.50

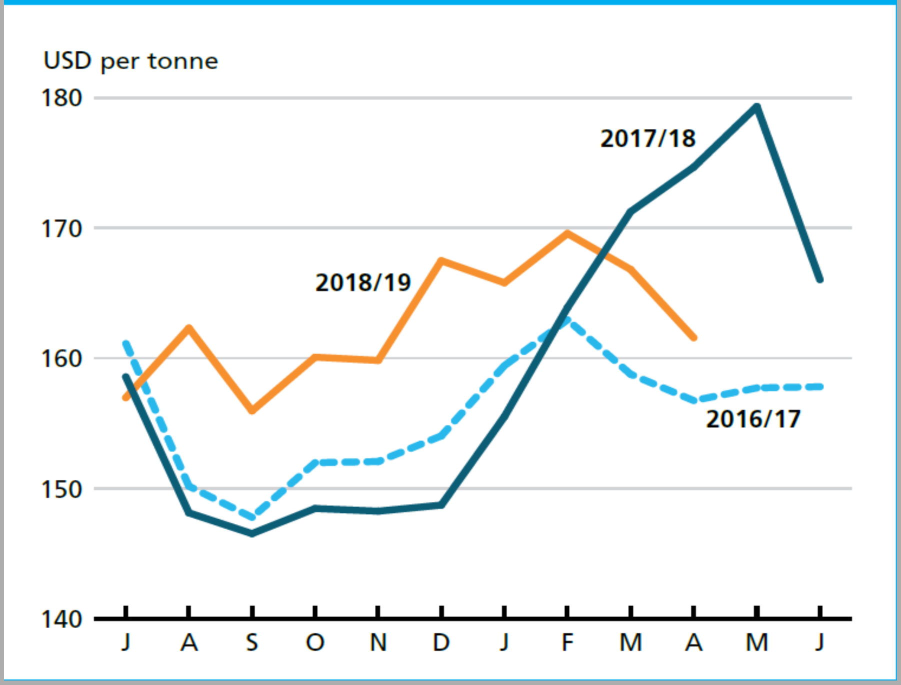
Source: United States Department of Agriculture (USDA)

- Global Export Volume in 2019/20 is down to 171.61 million tons.
- Brazil is the largest exporter of maize with 34 million tons followed by Argentina, Ukraine and Russia.
- Probable declines in exports from Argentina, Ukraine and USA due to the anticipated decline in domestic production this year.

Global Maize Situation

Global Maize Price

Figure 1. Maize export price (US No. 2 yellow, Gulf)



- Despite some tightening of the supply and demand balance during the 2018/19 season, international prices remained generally under downward pressure.
- With demand still absorbing record supply, it is expected to see higher corn price in 2019.

Source: United States Department of Agriculture (USDA)

Global Soybean Situation

Unit: Million Metric Tons

	2017/18	2018/19	2019/20 (proj)
Production	341.53	362.87	347.04
Ending Stocks	99.90	112.98	104.53

Source: United States Department of Agriculture (USDA)

Global Soybean Production

- Global soybean production in 2019/20 is projected at 347.04 million tons.
- Excessive rainfall delayed planting in US
- Reductions in Ukraine and Canada are offset by higher Uruguay production
- Soybean consumption, representing 60 percent of the oilseed sector, will continue to be the driving force in total volume growth.

Global Soybean Situation

Global Soybean Import

Unit: Million Metric Tons

	2017/18	2018/19	2019/20 (proj.)
World	152.92	148.83	150.82
Major Importers			
China	94.10	85.00	87.00
EU	14.58	15.80	15.10
Mexico	4.87	5.23	5.80
Argentina	4.70	6.35	3.90
Egypt	3.26	3.35	3.50

Source: United States Department of Agricultural (USDA)

- Global import volume in 2019/20 is projected to grow 13.37 percent in line with growing protein feed demand.
- China is projected to remain the world's largest importer of soybean, accounting for nearly 58 percent of global trade and expect to import up to 87 million tons.
- EU, the world's second largest buyer are forecast to fall to 15.10 million tons.

Global Soybean Situation

Global Soybean Export

Unit: Million Metric Tons

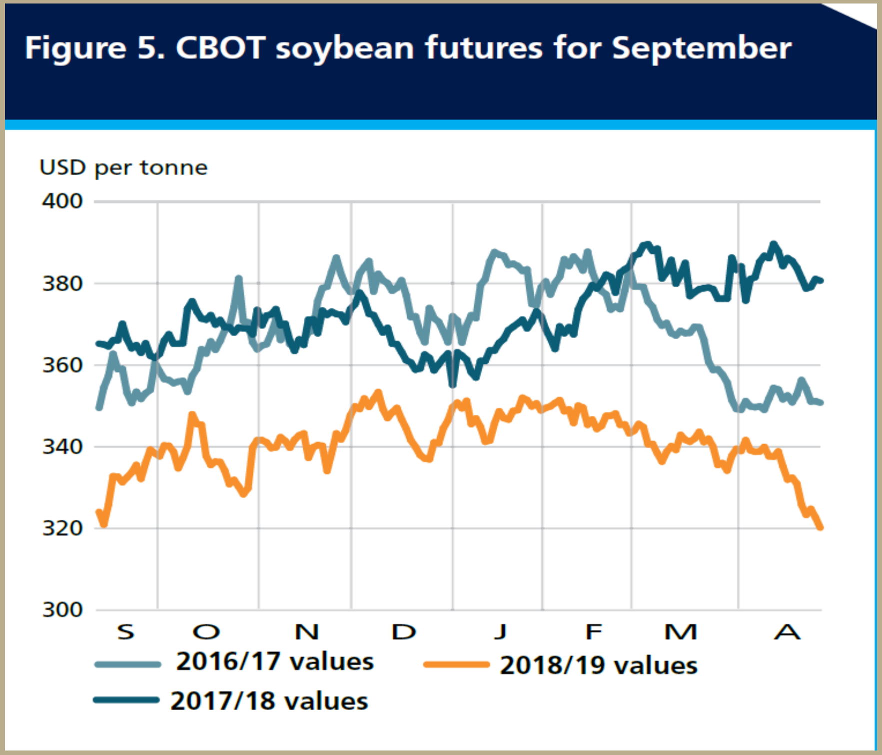
	2017/18	2018/19	2019/20 (proj.)
World	153.08	150.16	151.05
Major Exporters			
Brazil	76.18	77.25	76.00
USA	58.07	46.27	51.03
Argentina	2.11	8.75	8.00
Paraguay	6.03	5.60	6.20
Canada	4.93	5.40	4.20

Source: United States Department of Agriculture (USDA)

- Global export volume is projected to increase in 2019/20 to 151.05 million tons
- Brazil and USA will continue to be the main global soybean suppliers accounting for nearly 85 percent of global trade.
- Brazil is the leading soybean exporter as a larger projected harvest and preferential access to China.
- Lower exports for Canada and Argentina

Global Soybean Situation

Global Soybean Price



Source: Food and Agriculture Organization of the United Nation

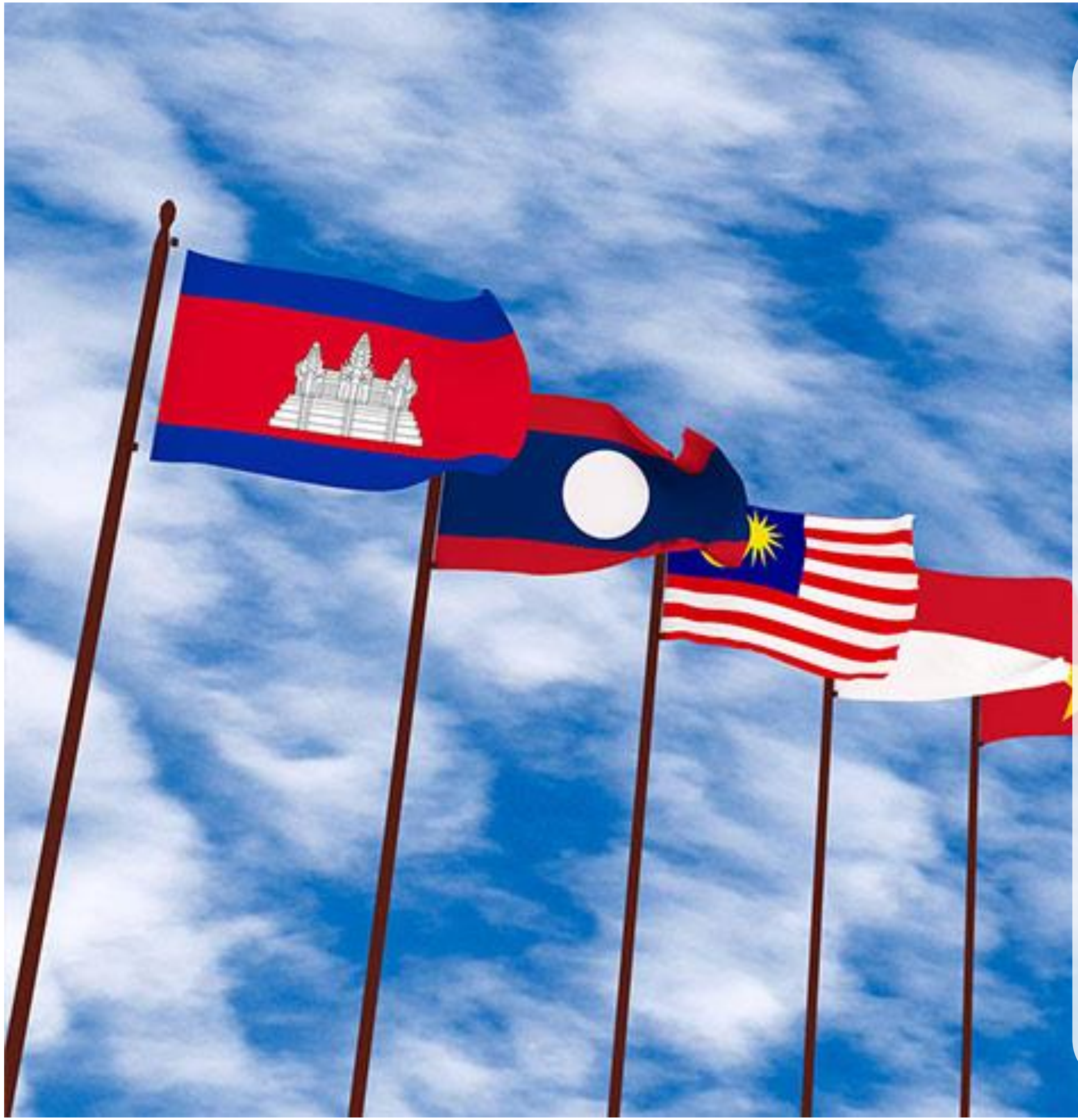
- The oilseed price index largely reflects developments in the global soybean market.
- Forecasts of lower global production, combined with signs of subdued import demand and the ensuing prospects of a massive build-up in inventories, kept prices under pressure.
- Unfavorable weather in parts of South America provided sporadic support to soybean prices.
- the prolonged USA-China trade negotiations affected market sentiment.

Thank you

Bangkok,Thailand

AFSRB Secretariat

15 August 2019



Review of the **ASEAN** Food Situation

The 39th AFSRB Meeting, Thailand

Presented by Department of Foreign Trade,
Ministry of Commerce, Thailand

ASEAN
Food Situation

01 Rice

02 Maize

03 Soybean

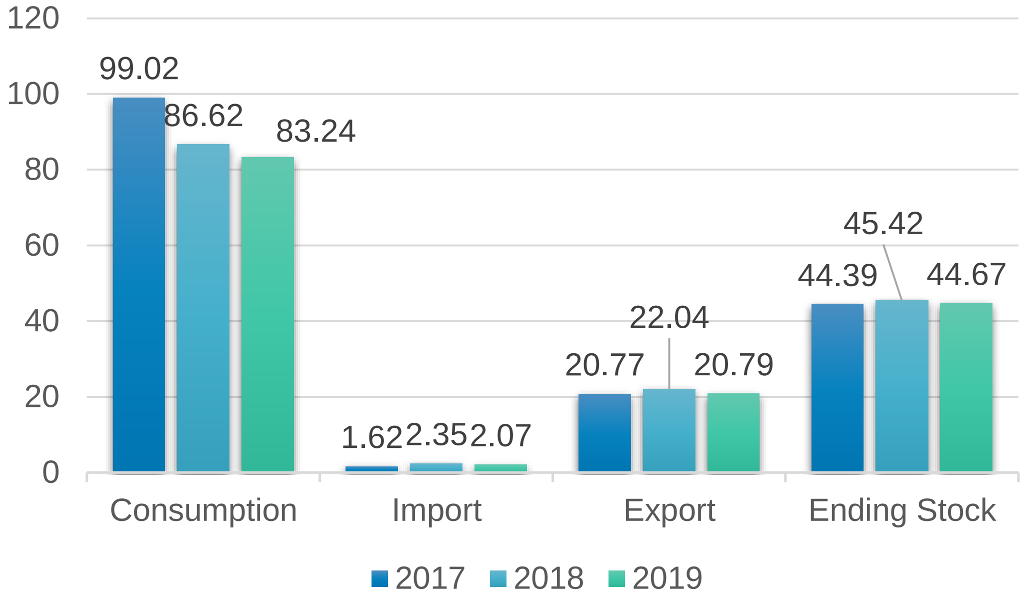
04 Sugar

ASEAN Rice

Attribute	2017	2018	2019	% Change 2018/19
Production (Paddy)	218.15	224.66	227.47	1.25
Consumption	99.02	86.62	83.24	-3.90
Import	1.62	2.35	2.07	-11.91
Export	20.77	22.04	20.79	-5.67
Ending Stock	44.39	45.42	44.67	-1.65

Unit: million tons

Source: AFSIS



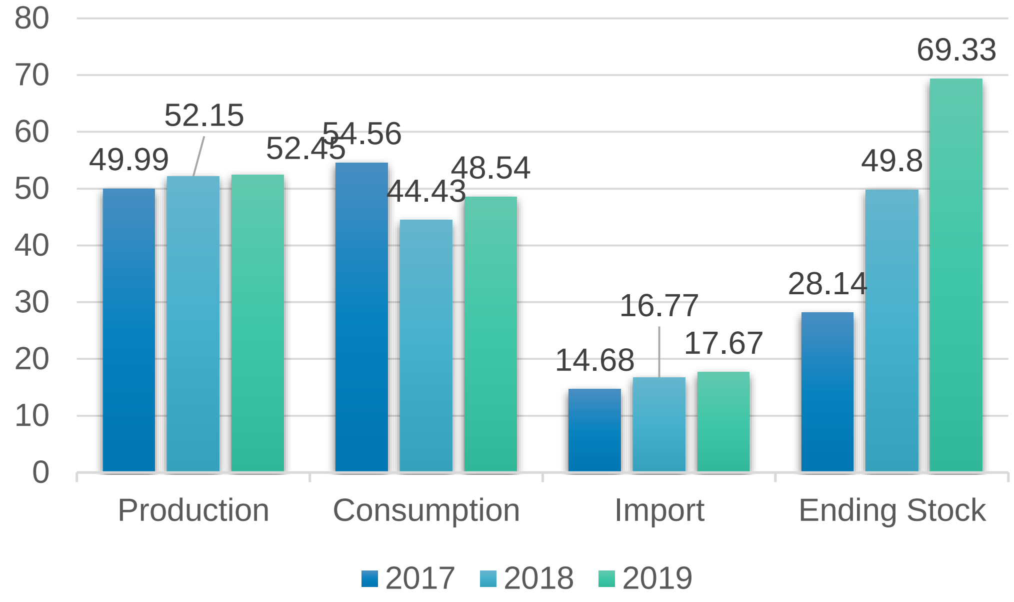
The 39th AFSRB Meeting, Thailand

ASEAN Maize

Attribute	2017	2018	2019	% Change 2018/19
Production	49.99	52.15	52.45	0.56
Consumption	54.56	44.43	48.54	9.25
Import	14.68	16.77	17.67	5.40
Export	2.21	2.77	2.05	-26.06
Ending Stock	28.14	49.80	69.33	39.22

Unit: million tons

Source: AFSIS



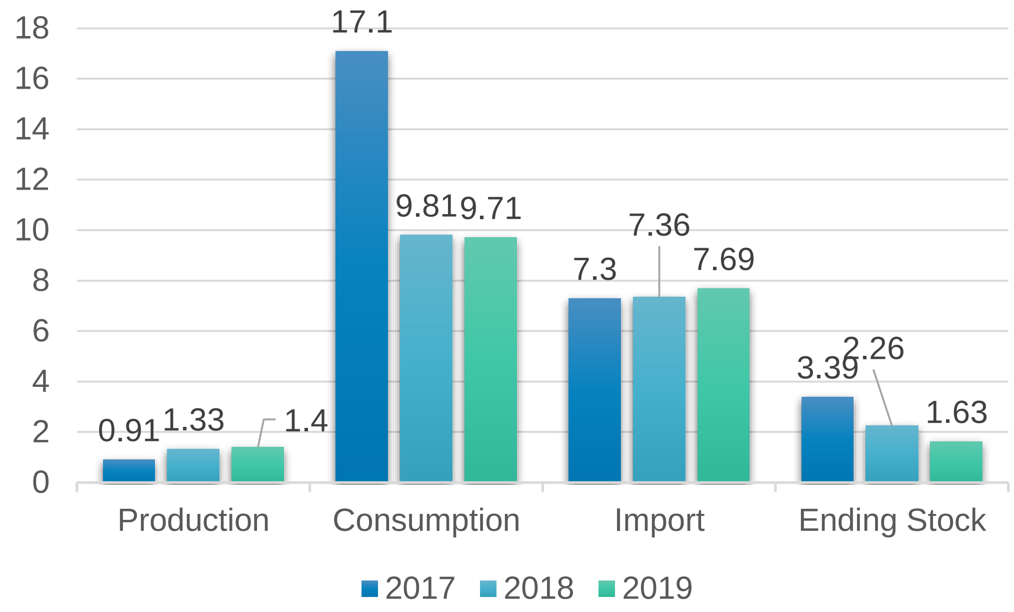
The 39th AFSRB Meeting, Thailand

ASEAN Soybean

Attribute	2017	2018	2019	% Change 2018/19
Production	0.91	1.33	1.40	5.26
Consumption	17.10	9.81	9.71	-1.02
Import	7.30	7.36	7.69	4.48
Export	0.0078	0.0085	0.0079	-7.06
Ending Stock	3.39	2.26	1.63	-27.88

Unit: million tons

Source: AFSIS

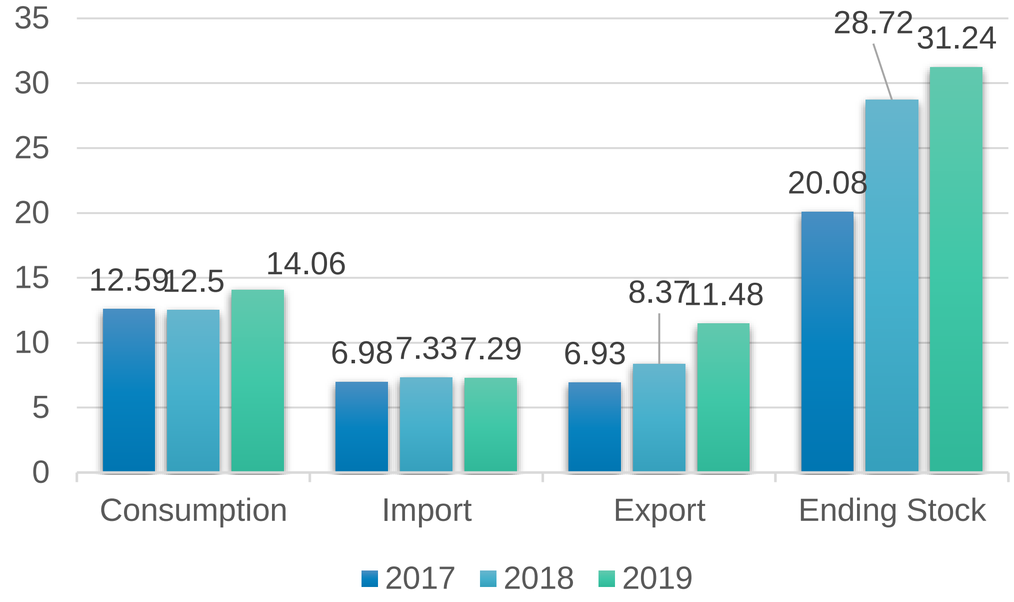


ASEAN Sugar

Attribute	2017	2018	2019	% Change 2018/19
Production (Sugarcane)	180.70	222.17	208.24	-6.27
Production (Sugar)	17.79	22.19	20.77	-6.40
Consumption	12.59	12.50	14.06	12.47
Import	6.98	7.33	7.29	-0.53
Export	6.93	8.37	11.48	37.16
Ending Stock	20.08	28.72	31.24	8.76

Unit: million tons

Source: AFSIS



ASEAN THAILAND 2019 ADVANCING PARTNERSHIP FOR SUSTAINABILITY

The 39th AFSRB Meeting, Thailand

THANK YOU

REVIEW OF THE ASEAN FOOD SITUATION

ASEAN RICE (MILLED BASIS)

1. Production

Regarding data from AFSIS, ASEAN paddy production in 2019 (crop year 2018/19) is forecasted to be 227.47 million tons, an increase of 1.25 percent, compared with 224.66 million tons in 2018 (crop year 2017/18). Such increase is mainly due to the rising in planted area and yield.

In 2018, paddy production is ASEAN was 224.66 million tons, increasing from 218.15 million tons in 2017 (crop year 2016/17). The increase was due to a rise in yield. The increase in production is found in most of the country except Lao PDR and Cambodia.

2. Consumption

ASEAN rice consumption in 2019 is predicted to decrease to 83.24 million tons, a decline of 3.90 percent, compared with 86.62 million tons in 2018. Indonesia, Vietnam, Myanmar and Thailand remain the major rice consumers in the region.

3. Trade

The estimated volume of ASEAN rice export in 2019 is 20.79 million tons or a decline of 5.67 percent from the previous year. The decrease in rice export is forecasted in Myanmar and Lao PDR. For import volume, it is expected to decrease from 2.35 million tons in 2018 to 2.07 million tons in 2019.

4. Stocks

In 2019, the ending stock is projected to be 44.67 million tons, decreasing 1.65 percent from the previous year. The decrease of rice stock is expected in Lao PDR, Thailand and Vietnam.

ASEAN MAIZE

1. Production

AFSIS data illustrates that production of ASEAN maize in 2019 (crop year 2018/19) is estimated to be 52.45 million tons, increasing 0.56 percent compared with that of the previous year. The increase has occurred in Indonesia, Myanmar and Thailand.

In 2018 (crop year 2017/18), maize production in ASEAN was 52.15 million tons, a rise of 4.32 percent from 49.99 million tons in 2017 (crop year 2016/17). Such increase was due to the increase in yield, and was found in most of the countries except Vietnam.

2. Consumption

ASEAN consumption of maize has been on an upward trend and is forecasted to rise to 48.54 million tons in 2019, increasing by 9.25 percent from the previous year. Indonesia, Vietnam and Thailand are the major maize consumers in the region.

3. Trade

The maize export from ASEAN is predicted to be 2.05 million tons in 2019, decreasing by 26.06 percent from the previous year. A major decline in export volume is forecasted to occur in Myanmar. In terms of import, it is estimated to be 17.67 million tons in 2019, increasing from 16.77 million tons in 2018.

4. Stocks

The ASEAN maize ending stock in 2019 is projected to be 69.33 million tons or 39.22 percent increase from the previous year. The increasing stocks can be expected in Indonesia, Lao PDR, Philippines and Thailand.

ASEAN SOYBEAN

1. Production

In 2019 (crop year 2018/19), ASEAN soybean production is forecasted to increase to 1.40 million tons, or 5.26 percent increase compared to 1.33 million tons in 2018.

Soybean production in ASEAN in 2018 (crop year 2017/18) was 1.33 million tons, an increase of 46.15 percent compared with 0.91 million tons in 2017 (crop year 2016/17). Such increase was due to the increase in planted area. Indonesia is ranked first in soybean production in the region, followed by Myanmar, Vietnam, Thailand, Lao PDR and the Philippines. The productions of soybean decreased in Vietnam and Myanmar.

2. Consumption

ASEAN soybean consumption is expected to decrease 1.02 percent from 9.81 million tons in 2018 to 9.71 million tons in 2019. The decreasing consumption can be expected mostly from Myanmar.

3. Trade

In 2019, the export of ASEAN soybean is forecasted to be about 0.0079 million tons, which decreased by 7.06 percent from the previous year. The import of ASEAN soybean is projected to increase from 7.36 million tons in 2018 to 7.69 million tons in 2019. Thailand, Indonesia and Vietnam are the major importing countries.

4. Stock

The ASEAN soybean ending stock is estimated to decrease about 27.88 percent from 2.26 million tons in 2018 to 1.63 million tons in 2019. The decreasing stocks can be expected from Indonesia and Myanmar.

ASEAN SUGAR

1. Production

AFSIS data shows that ASEAN sugarcane production is forecasted to decrease 5.41 percent from 222.17 million tons in 2018 (crop year 2018/19) to 208.24 million tons in 2019 (crop year 2018/19). Similarly, in 2019, ASEAN sugar production is predicted to decline to 20.77 million tons, compared with 22.19 million tons in 2018.

The sugarcane production in ASEAN in 2018 was 222.17 million tons, up from 180.70 million tons in 2017 or about 23 percent. The increase in production was due to the increase in yield in Indonesia, Cambodia, Vietnam and Thailand. The yield of sugarcane in ASEAN in 2018 was at 70.57 tons per hectare, increased from 65.99 tons per hectare in 2017.

2. Consumption

The regional sugar consumption in 2019 is forecasted to increase from 12.50 million tons of sugar in 2018 to 14.06 million tons in 2019, which is about 2 million tons increase. Indonesia, Thailand, Philippines and Myanmar are still major sugar consumers in the region.

3. Trade

The sugar export from ASEAN is predicted to increase about 37.16 percent from 8.37 million tons in 2018 to 11.48 million tons in 2019. Thailand is a major exporter with an expected amount of 10.50 million tons in 2019. For ASEAN sugar import, it is forecasted to slightly decrease from 7.33 million tons in 2018 to 7.29 million tons in 2019 or about 0.53 percent. Indonesia and Malaysia are major sugar importers in the region.

4. Stock

The ending stock of sugar in ASEAN in 2019 is forecasted to be 31.24 million tons which is about 8.76 percent increase from the previous year.

Brunei

The 39th Meeting of the ASEAN Food Security Reserve Board (AFSRB)

15 – 16 August 2019

Bangkok, Thailand

COUNTRY REPORT
BRUNEI DARUSSALAM

by

Hajah Aidah binti Haji Mohd Hanifah

Bibi Khadizah binti Haji Rusli

جابتن ڤرتانين دان اݢري ماکنن

AGRICULTURE AND AGRIFOOD DEPARTMENT

MINISTRY OF PRIMARY RESOURCES AND TOURISM | BRUNEI DARUSSALAM

Content

CURRENT STATUS
AGRICULTURE AND AGRIFOOD IN BRIEF 2018

Developed Agricultural Land

Livestock:	3,135.74 ha
Crops:	4,529.37 ha
TOTAL	**: 7,665.11 ha**

Agriculture/Agrifood Farmers & Entrepreneurs

Livestock:	832 Entrepreneurs
Crops:	4,322 Entrepreneurs
Agrifood :	385 Entrepreneurs
TOTAL :	**5,539 Entrepreneurs**

Gross Output of Agricultural Production

Livestock:	$244.63 million
Crops:	$63.69 million
Agrifood Processing:	$127.98 million
TOTAL:	**$436.30 million**

Agricultural Labour Force

Livestock:	2,160	Persons
Crops:	2,086	Persons
Agrifood:	4,047	Persons
TOTAL:	**8,293**	**Persons**

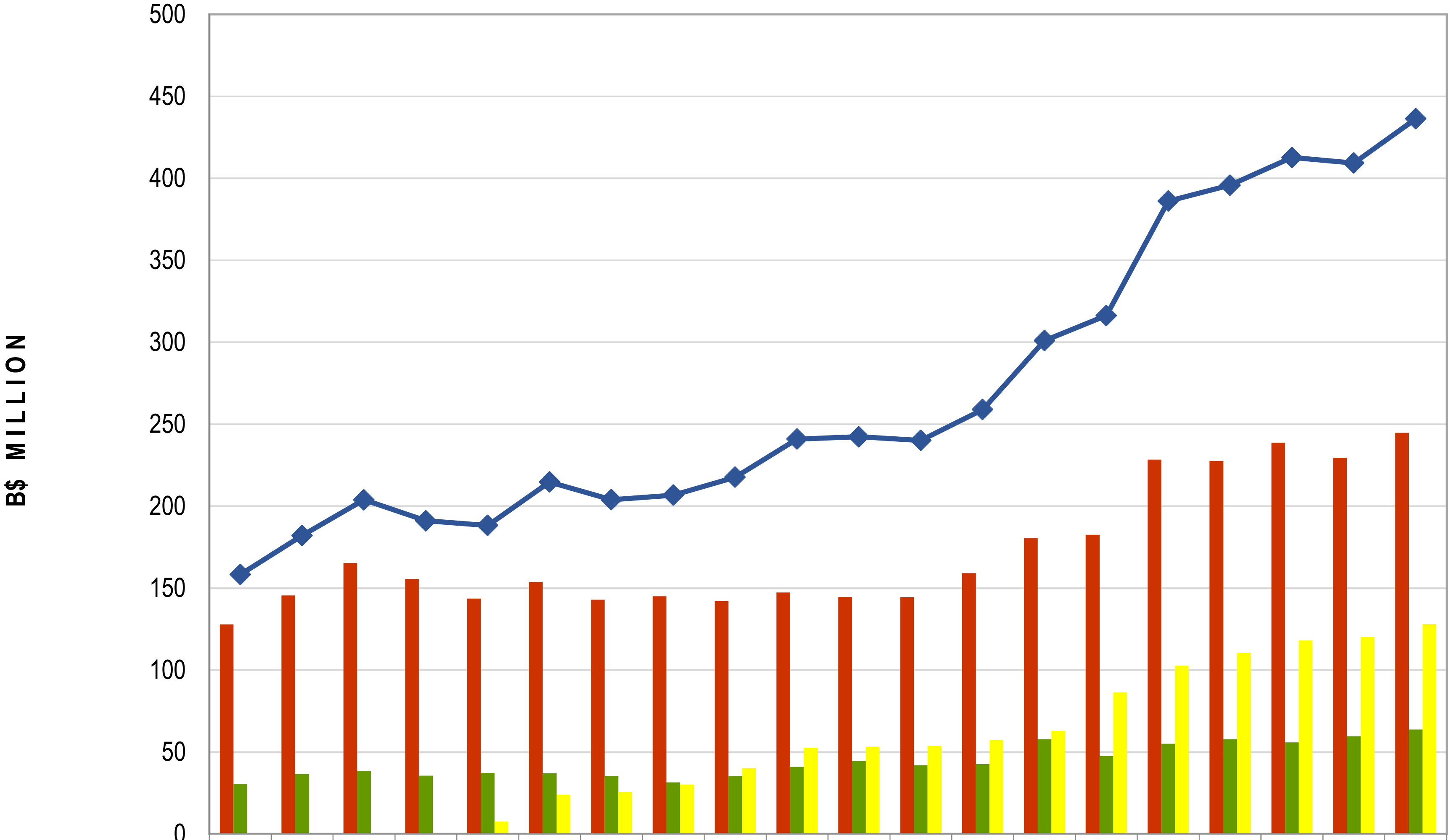
Brunei Population : 421,300 Persons

Note :

1/. Area include Agricultural Development Area (ADA), Existing Area (Ladang Sedia Ada) – EDR & TOL, Young Famer Area and Rural Agricultural Development Area (KPLB).

2/. Brunei Population – Report of Population Estimate 2017 (Source : Department of Economic Planning and Development)

AGRICULTURAL GROSS OUTPUT 1999-2018



	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Livestock Industry	128	145	165	156	144	154	143	145	142	147	145	144	159	180	183	228	227	239	229	245
Crop Industry	30	37	39	35	37	37	35	32	35	41	44	42	43	58	48	55	58	56	60	64
Agrifood Processing	0	0	0	0	8	24	26	30	40	53	53	54	57	63	86	103	110	118	120	128
Overall Agriculture Production	158	182	204	191	188	215	204	207	218	241	242	240	259	301	316	386	396	413	409	436

LOCAL PRODUCTION AND IMPORT OF MAJOR FOOD COMMODITIES 2018

COMMODITY	LOCAL PRODUCTION (MT)	IMPORT (MT)	TOTAL (MT)	IMPORT (%)	LOCAL (%)
Fruits	9,752	16,396	26,148	63	37
Vegetables	11,040	12,680	23,719	53	47
Rice	1,569	32,198	33,767	95	5
Other Crops	1,424	15,283	16,707	91	9
Eggs	7,731	0	7,731	0	100
Chicken Meat	25,387	2,994	28,381	11	89
Beef	1,511	3,650	5,161	71	29
Mutton	56	0	56	0	100
TOTAL	**58,469**	**83,201**	**141,670**	**59**	**41**

ESTIMATED COMMODITIES' SUPPLY AND UTILIZATION FOR YEAR 2017-2020

Commodity: Rice

Unit: Metric ton

YEAR	2017	2018	2019	2020
Beginning Stock	17,420.4	7,599.4	9,021.9	9,317.1
Production:				
- Paddy basis	2,348.8	2,413.2	2,598.4	3,487.0
- Milled basis	1,526.7	1,568.6	1,688.9	2,266.6
Import	20,810.4	33,620.8	31,892.0	32,848.8
Total Supply	**39,757.5**	**42,788.7**	**42,602.8**	**44,432.5**
Domestic Use	32,158.1	33,766.8	33,285.7	34,811.3
Export	0.0	0.0	0.0	0.0
Ending Stock	7,599.4	9,021.9	9,317.1	9,621.2

Note : Data 2017 & 2018 - actual data and Data 2019 & 2020 - estimated

ESTIMATED COMMODITIES' SUPPLY AND UTILIZATION FOR YEAR 2017-2020

Commodity: Maize

Unit: Metric ton

YEAR	2017	2018	2019	2020
Beginning Stock	n/a	n/a	n/a	n/a
Production	0.0	0.0	0.0	0.0
Import	409.4	606.3	653.8	673.5
Total Supply	n/a	n/a	n/a	n/a
Domestic Use	n/a	n/a	n/a	n/a
Export	0.0	0.0	0.0	0.0
Ending Stock	n/a	n/a	n/a	n/a

Note : Data 2017 & 2018 - actual data and Data 2019 & 2020 - estimated

ESTIMATED COMMODITIES' SUPPLY AND UTILIZATION FOR YEAR 2017-2020

Commodity: Soybean

Unit: Metric ton

YEAR	2017	2018	2019	2020
Beginning Stock	n/a	n/a	n/a	n/a
Production	0.0	0.0	0.0	0.0
Import	602.7	620.8	669.5	689.6
Total Supply	n/a	n/a	n/a	n/a
Domestic Use	n/a	n/a	n/a	n/a
Export	0.0	0.0	0.0	0.0
Ending Stock	n/a	n/a	n/a	n/a

Note : Data 2017 & 2018 - actual data and Data 2019 & 2020 - estimated

ESTIMATED COMMODITIES' SUPPLY AND UTILIZATION FOR YEAR 2017-2020

Commodity: Sugar

Unit: Metric ton

YEAR	2017	2018	2019	2020
Beginning Stock	2,770.0	1,052.0	3,067.2	2,946.5
Production	0.0	0.0	0.0	0.0
Import	3,696.0	7,434.0	5,334.1	5,494.1
Total Supply	**6,466.0**	**8,486.0**	**8,401.2**	**8440.6**
Domestic Use	5,414.0	5,418.8	5,454.7	5,618.4
Export	0.0	0.0	0.0	0.0
Ending Stock	1,052.0	3,067.2	2,946.5	2,822.2

Note : Data 2017 & 2018 - actual data and Data 2019 & 2020 - estimated

Thank you!

Table : Estimated Commodities' Supply and Utilization for Year 2017-2020

Country : **BRUNEI DARUSSALAM**

Unit : metric tons

Particulars	Rice				Maize				Soybean				Sugar			
	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020
Beginning Stock	17,420.4	7,599.4	9,021.9	9,317.1	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	2,770.0	1,052.0	3,067.2	2,946.5
Production					0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Paddy basis	2,348.8	2,413.2	2,598.4	3,487.0												
- Milled Basis	1,526.7	1,568.6	1,688.9	2,266.6												
Import*	20,810.4	33,620.8	31,892.0	32,848.8	409.4	606.3	653.8	673.5	602.7	620.8	669.5	689.6	3,696.0	7,434.0	5,334.1	5,494.1
Total Supply	39,757.5	42,788.7	42,602.8	44,432.5	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	6,466.0	8,486.0	8,401.2	8,440.6
Domestic Use	32,158.1	33,766.8	33,285.7	34,811.3	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	5,414.0	5,418.8	5,454.7	5,618.4
Export*	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Ending Stock	7,599.4	9,021.9	9,317.1	9,621.2	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	1,052.0	3,067.2	2,946.5	2,822.2

Notes : 1. Data provided would be used for ASEAN food situation analysis
2. Please fill in the table with complete data
3. in case that the data is not available or nil,please specify
* Export/Import 2019 : January - May or June 2019 (Whichever available)

Source : **Department of Agriculture & Agrifood, Negara Brunei Darussalam.**

Note : Data 2017 & 2018 - real data and Data 2019 & 2020 - estimated

Cambodia

Table : Estimated Commodities' Supply and Utilization for Year 2017-2020

Country :

Unit : 1,000 metric tons

Particulars	Milled Rice				Maize				Soybean				Sugar			
	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020
Beginning Stock	5,962,969	1,922,933	2,766,694	3,852,883	341,769	405,597	370,513	510,859	26,112	27,324	7,389	2,689	N/A	N/A	N/A	N/A
Production					407,641	1,231,466	1,303,751	1,329,826	100,857	73,288	91,766	94,519	740,870	629,320	691,907	684,988
- Paddy basis	9,952,270	10,518,339	10,891,735	11,218,487												
- Milled Basis	6,369,453	6,731,737	6,970,710	7,179,832												
Import*	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Supply	12,332,422	8,654,670	9,737,404	11,032,715	749,410	1,637,063	1,674,264	1,840,685	126,969	100,612	99,155	97,208	740,870	629,320	691,907	684,988
Domestic Use	4,240,865	5,252,297	5,258,296	5,258,296	268,914	1,097,865	959,221	959,221	60,945	64,016	57,566	60,317	672,620	629,320	691,907	684,988
Export*	542,144	635,679	626,225	312,245	70,487	168,685	204,184	108,077	38,700	30,073	38,900	6,250	68,250	-	-	-
Ending Stock	7,549,412	2,766,694	3,852,883	5,462,174	405,597	370,513	510,859	773,387	27,324	6,523	2,689	30,640	N/A	N/A	N/A	N/A

Notes : 1. Data provided would be used for ASEAN food situation analysis
2. Please fill in the table with complete data
3. in case that the data is not available or nil,please specify
* Export/Import 2019 : January - May or June 2019 (Whichever available)

The 39th Meeting of the ASEAN Food Security Reserve Board

Agriculture Perspectives and Production in Cambodia

By Cambodian Delegate

15-16 August 2019, Thailand

Contents

1. Agricultural Strategic Master Plan 2030

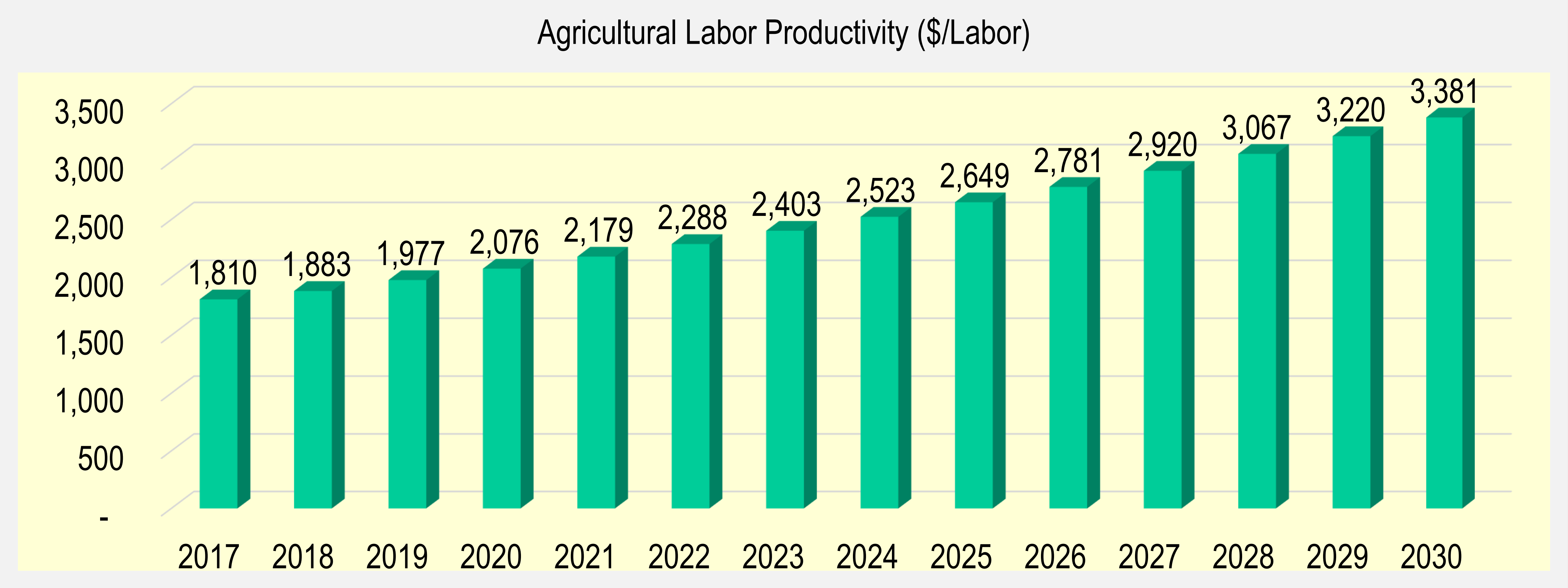
<u>Vision</u>: “A modern agriculture sector which is competitive, inclusive, resilient and sustainable to contribute to food security, safety and nutrition for the prosperity and wellbeing of the Cambodian people”.

<u>Policy Goals</u>: “Increase agricultural growth and expand agricultural exports with high quality and safety through enhancing agricultural productivity, value added and enabling competition, taking into account the sustainable use of land and ensuring sustainable fisheries and forestry resource management”.

<u>Mission</u>: “Provide high quality services with a sound scientific, technological and legislative base for developing an efficient and sustainable Cambodian agriculture sector”.

1. Agricultural Strategic Master Plan 2030

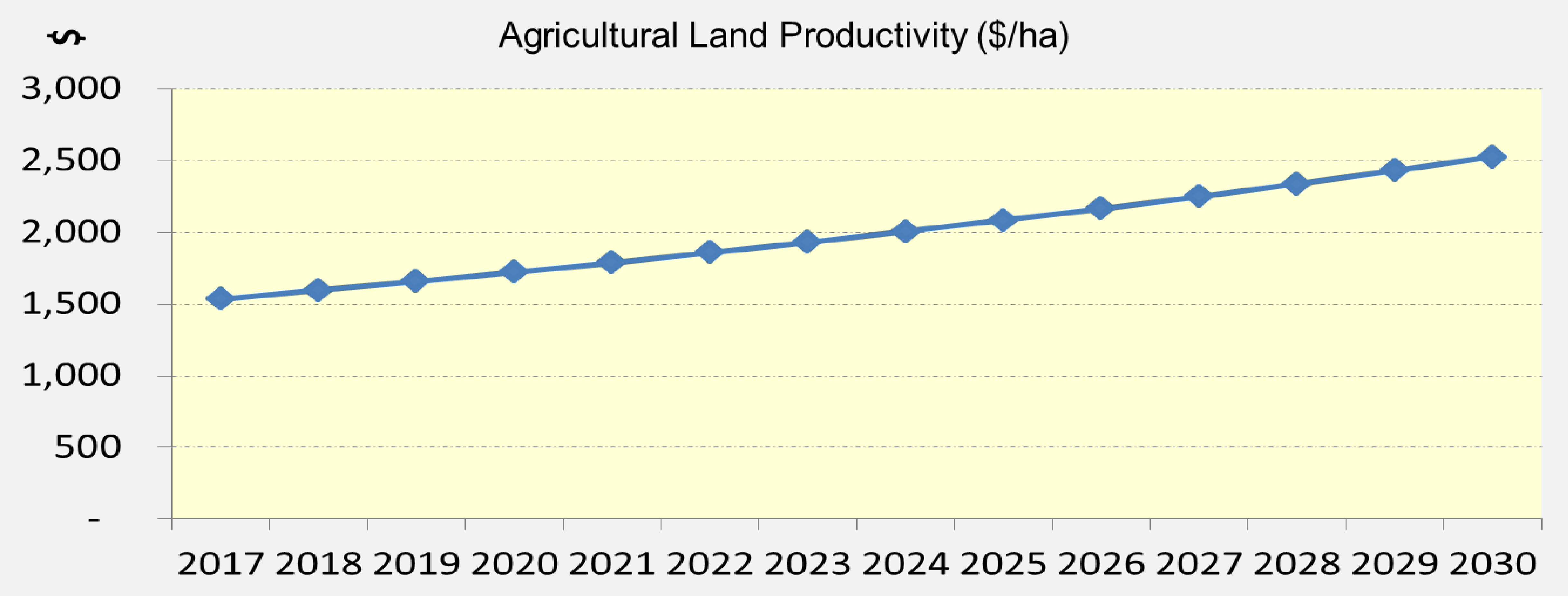
Policy Indicators 1:



Agricultural labor productivity increased by 4-5% per year/labor)

1. Agricultural Strategic Master Plan 2030

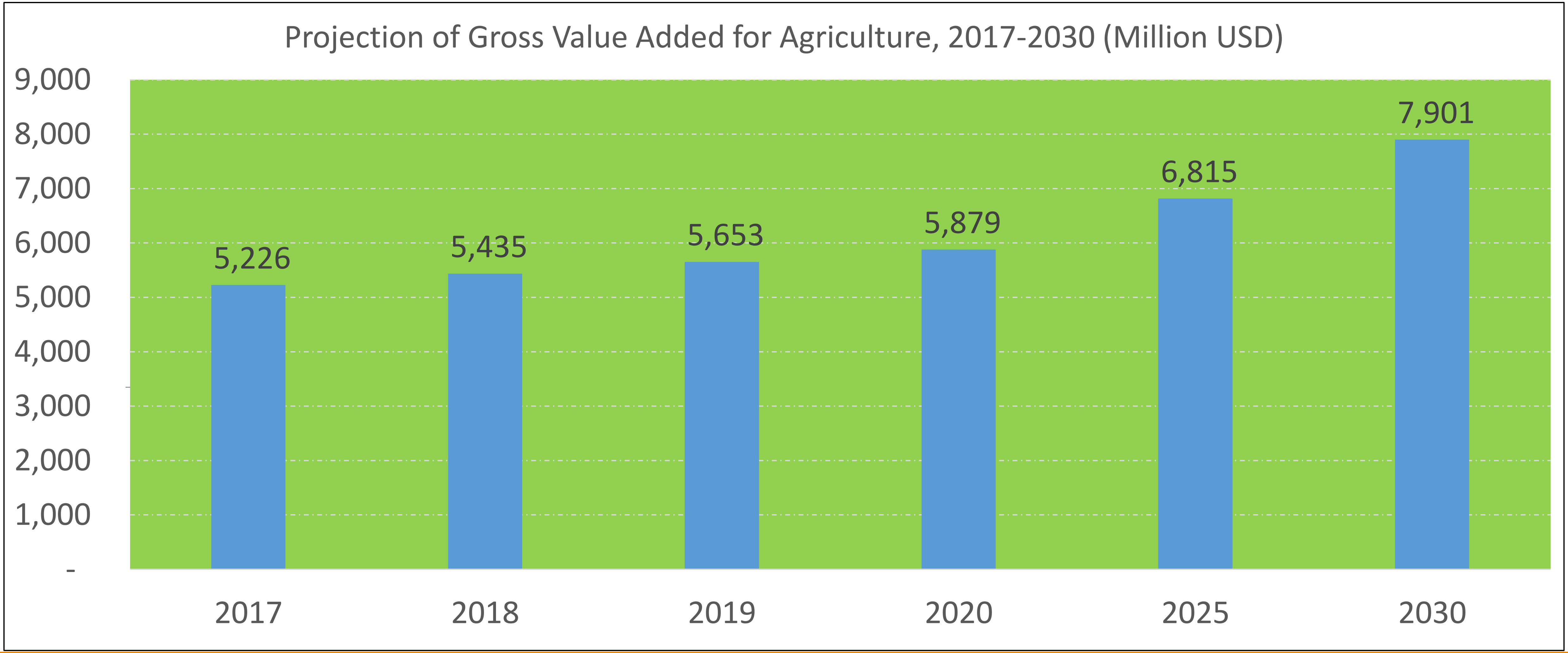
Policy Indicators 2:



Agricultural Land Productivity increased by 9% per annum

1. Agricultural Strategic Master Plan 2030

Policy Indicators 3:



2. Agricultural Strategic Development Plan 2019-2023

<u>Objectives</u>: “Increase Agricultural Production and Commodities Export by 5% and 7% per year, respectively ”.






2. Agricultural Strategic Development Plan 2019-2023

PROGRAM:

Increase Agricultural Production and Commodities Export by 5% and 7% per year, respectively

Program 1:
Enhance crop productivity, diversification and agri-business

Program 2:
Promotion of animal health and production

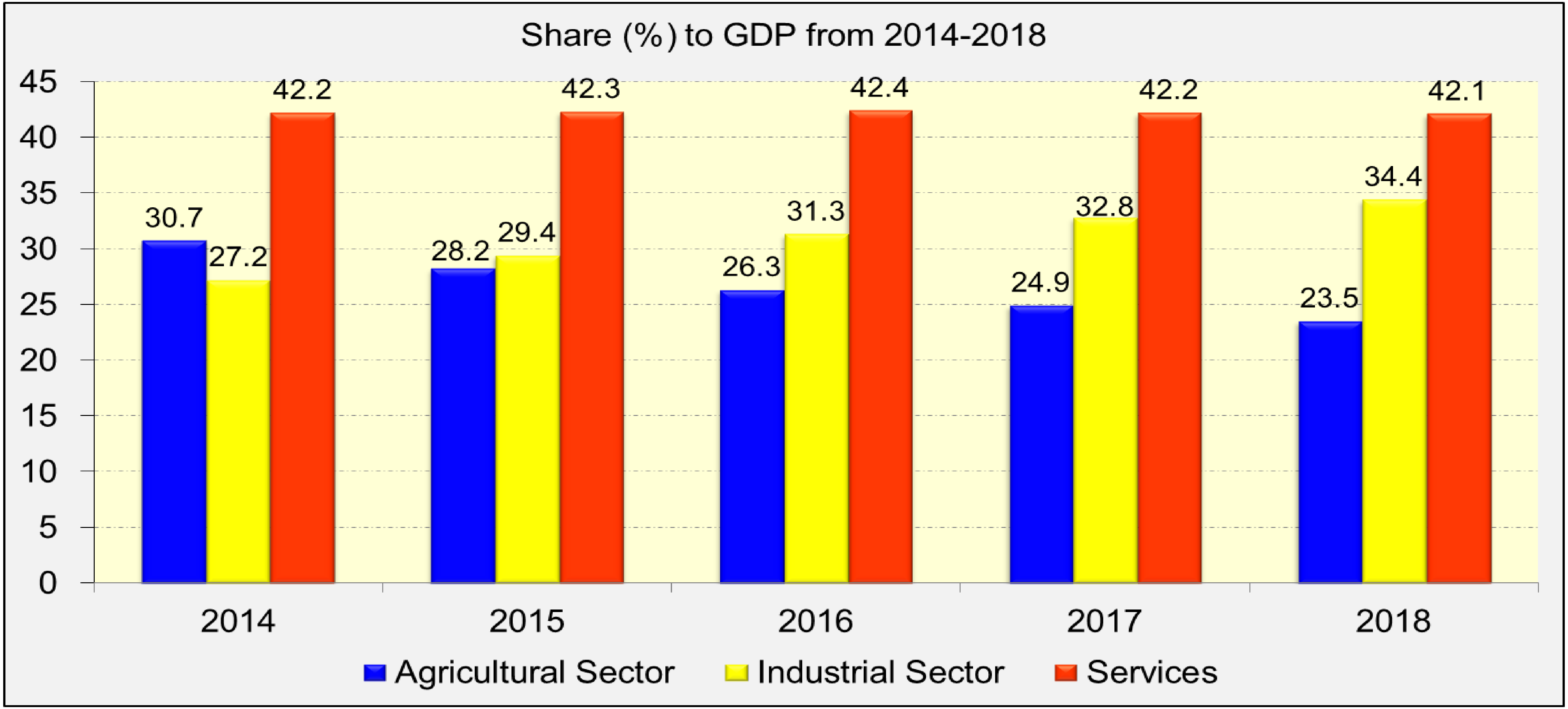
Program 3:
Fisheries resource management and aquaculture development

Program 4:
Forestry and wildlife resource management and development

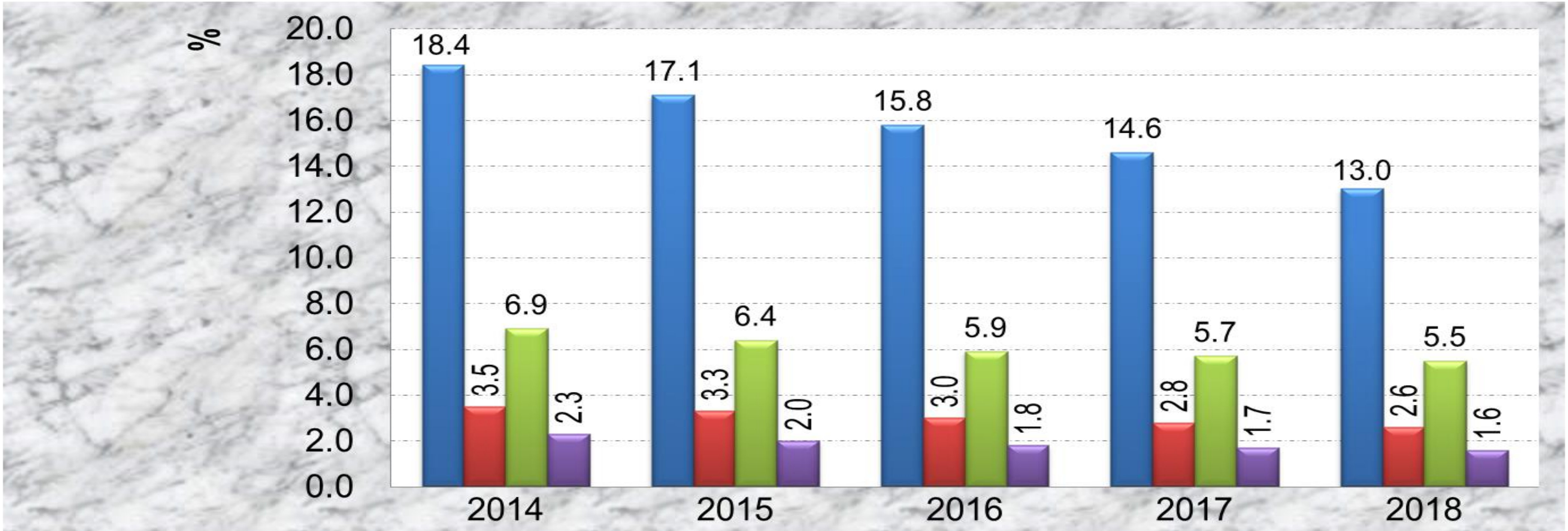
Program 5:
Increase efficiency of supporting services and HRD

Sub-Program and Cluster Activity

3. Achievement-Contribution of Agriculture in the National Economy



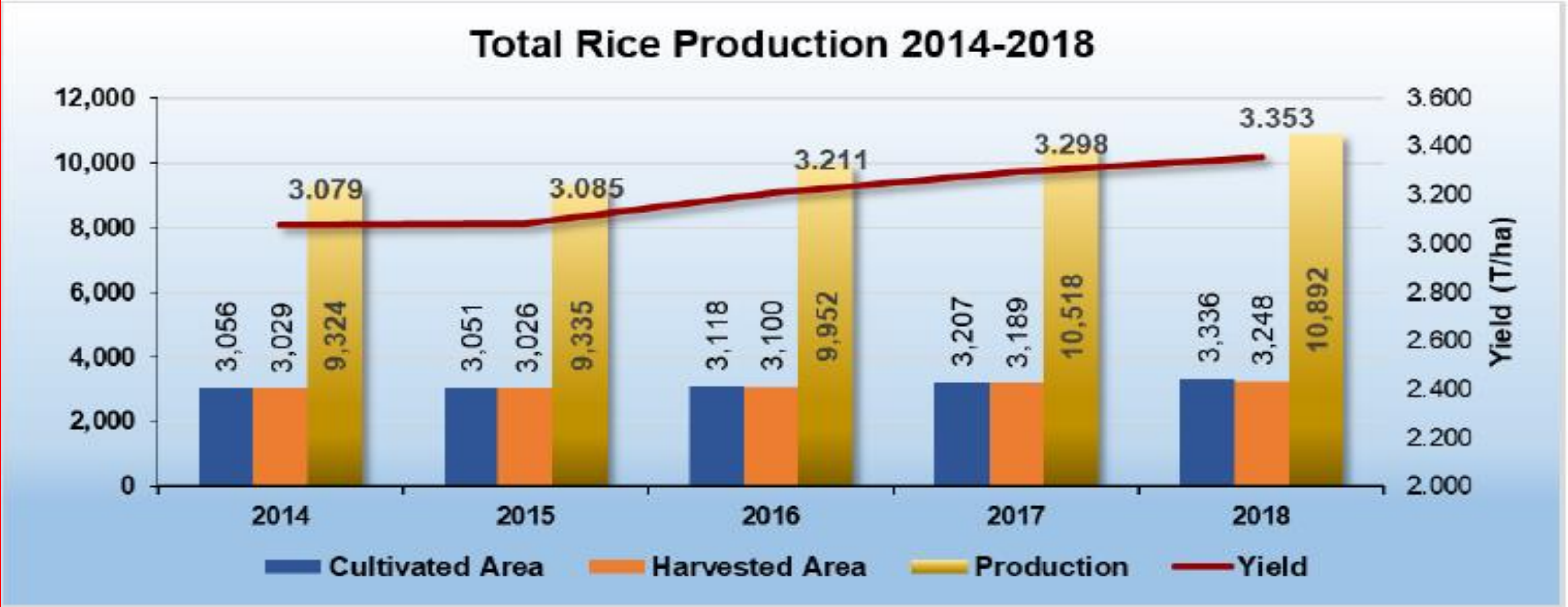
3. Achievement-Contribution of Agriculture Sub-Sector in the National Economy



	2014	2015	2016	2017	2018
Crop	18.4	17.1	15.8	14.6	13.0
Livestock & Poultry	3.5	3.3	3.0	2.8	2.6
Fisheries	6.9	6.4	5.9	5.7	5.5
Foresrty & Logging	2.3	2.0	1.8	1.7	1.6

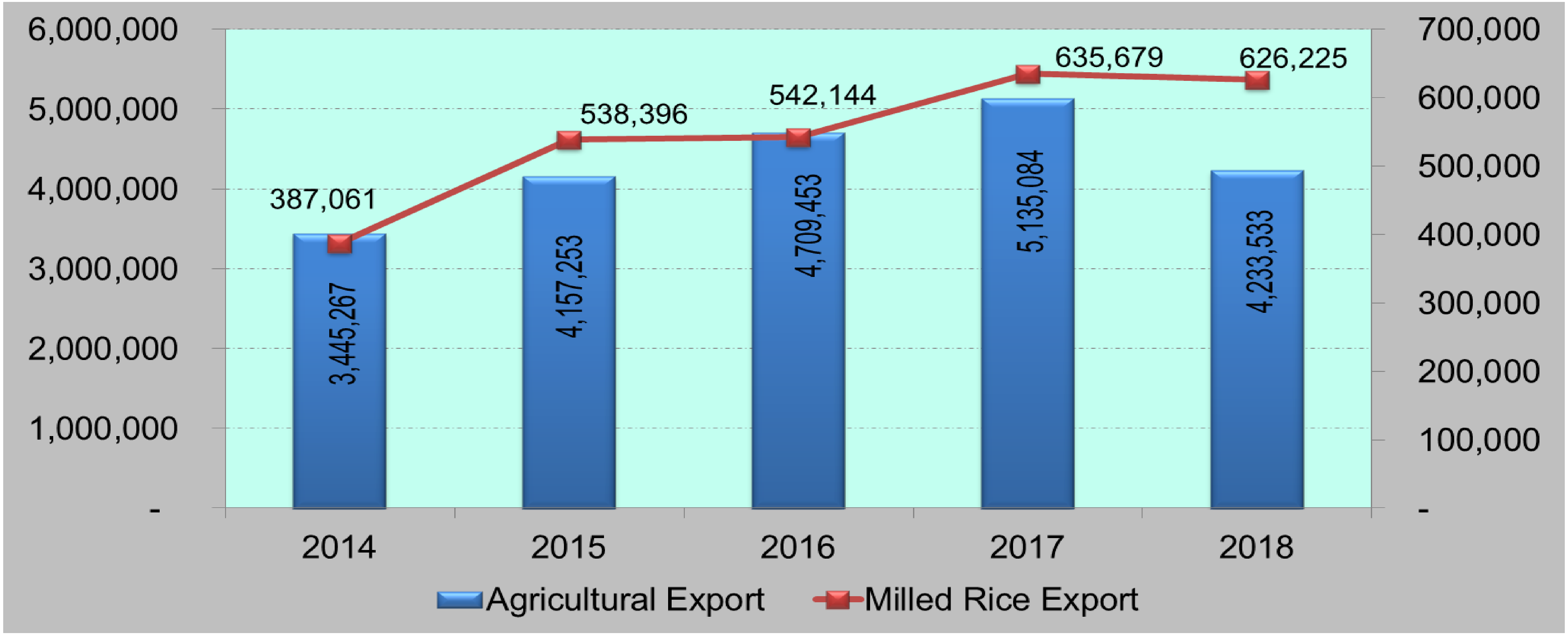
4. Achievement-Crop Sub-Sector

4.1 Rice Production (Cultivated Area_ Million Ha, Harvested Area_ Million Ha, Production_ Ton)



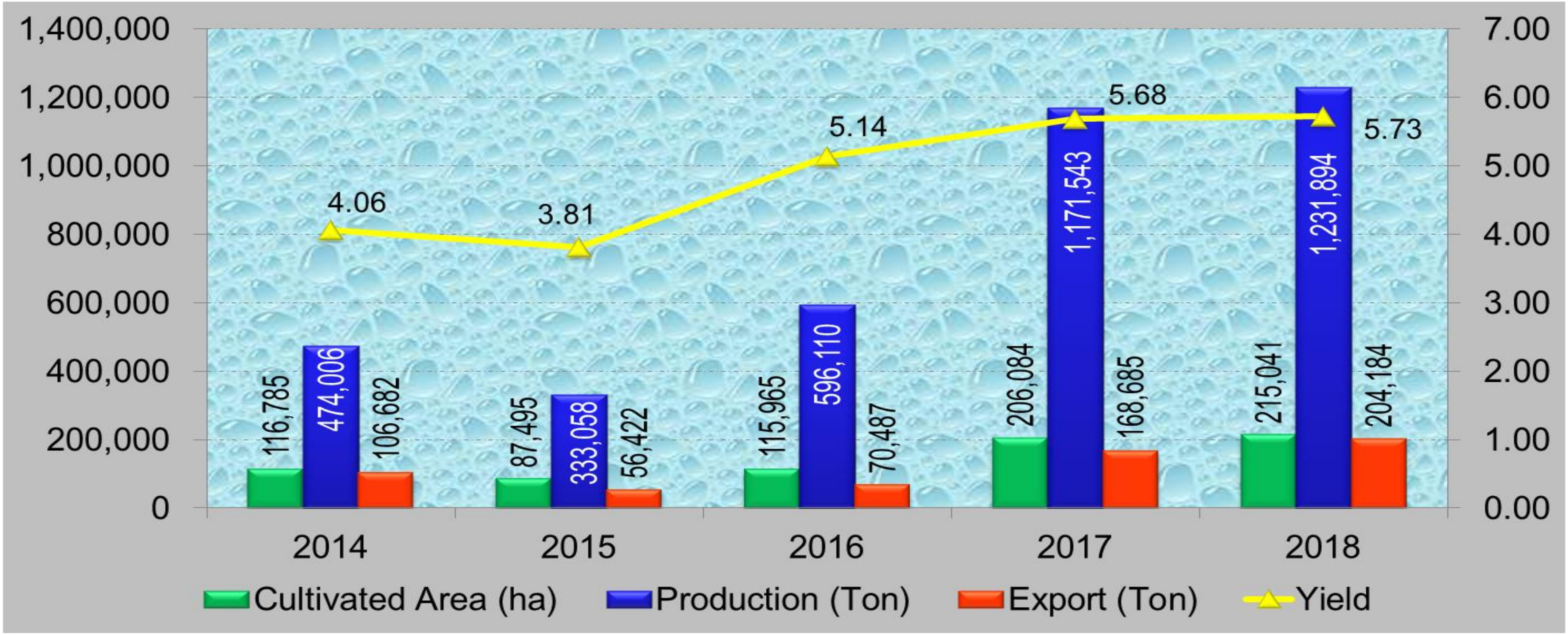
4. Achievement-Crop Sub-Sector

4.1 Agricultural Commodity Export and Milled Rice Export (tons)



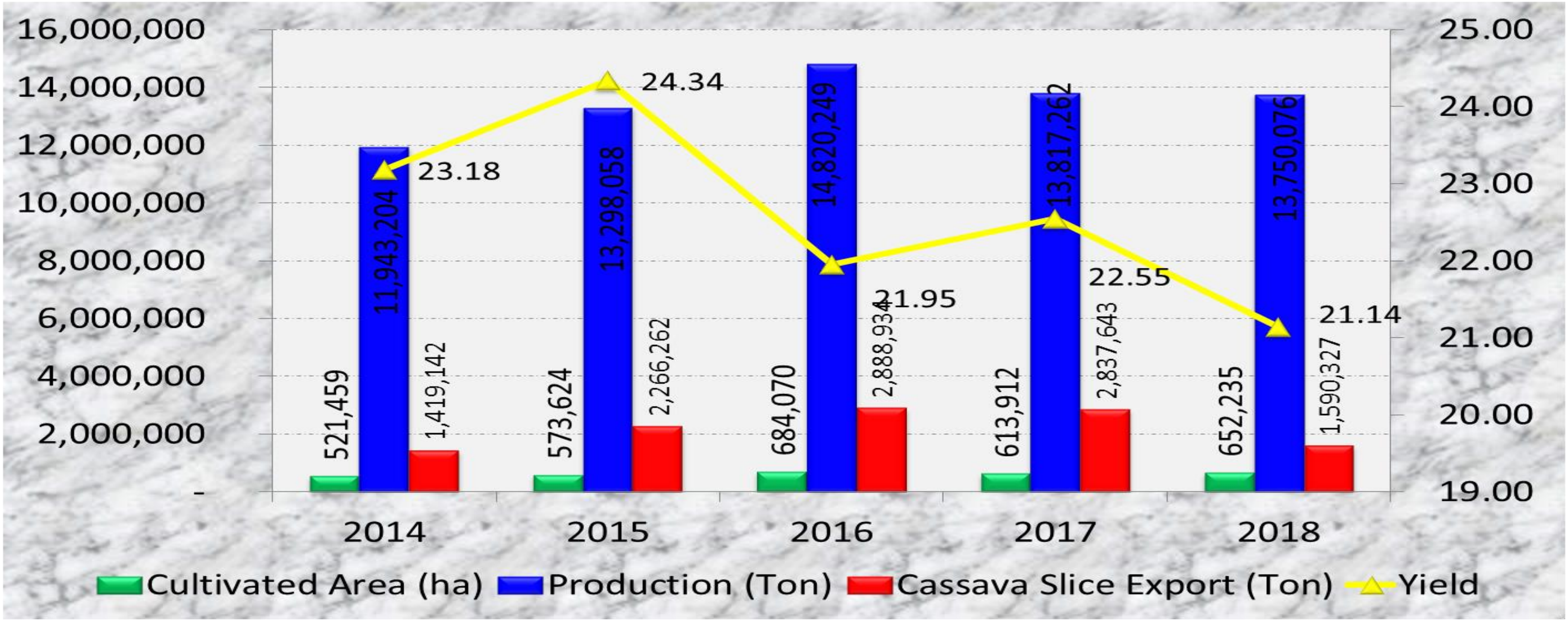
4. Achievement-Crop Sub-Sector

4.2 Yellow Maize Production and Export



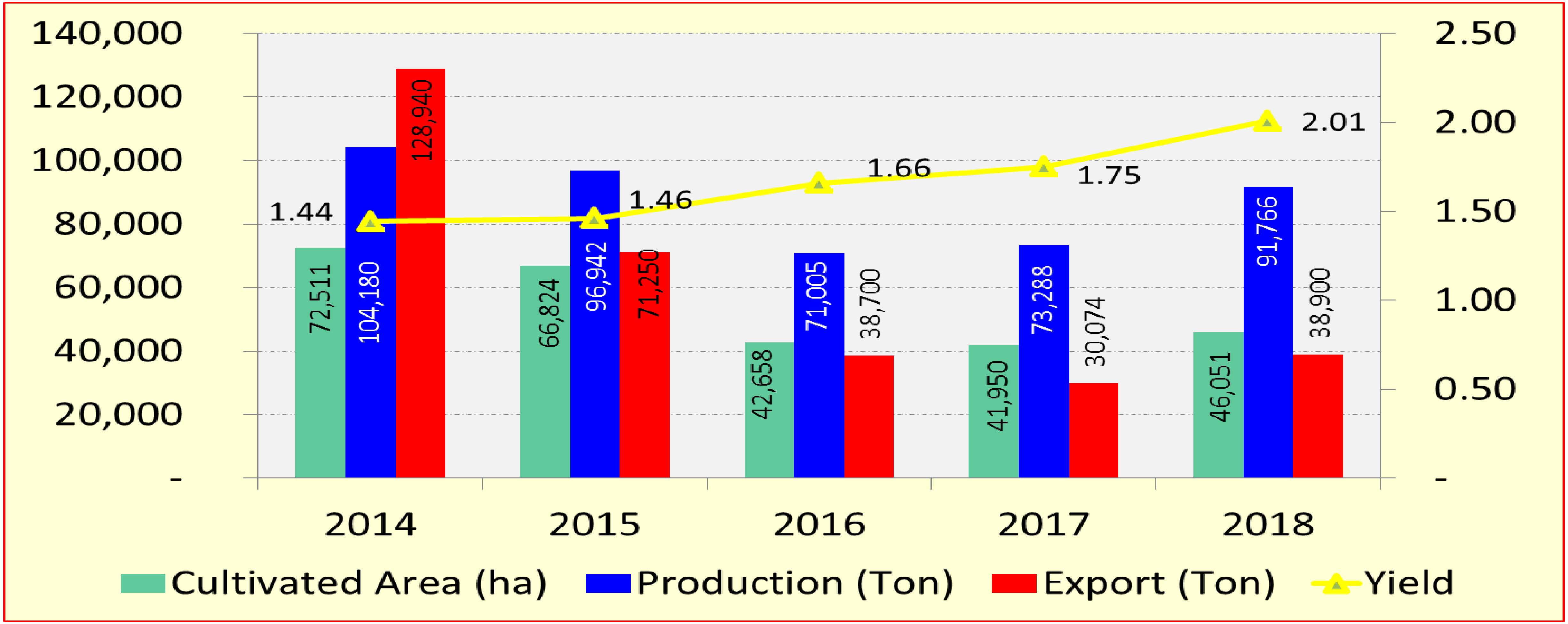
4. Achievement-Crop Sub-Sector

4.3 Cassava Production and Export



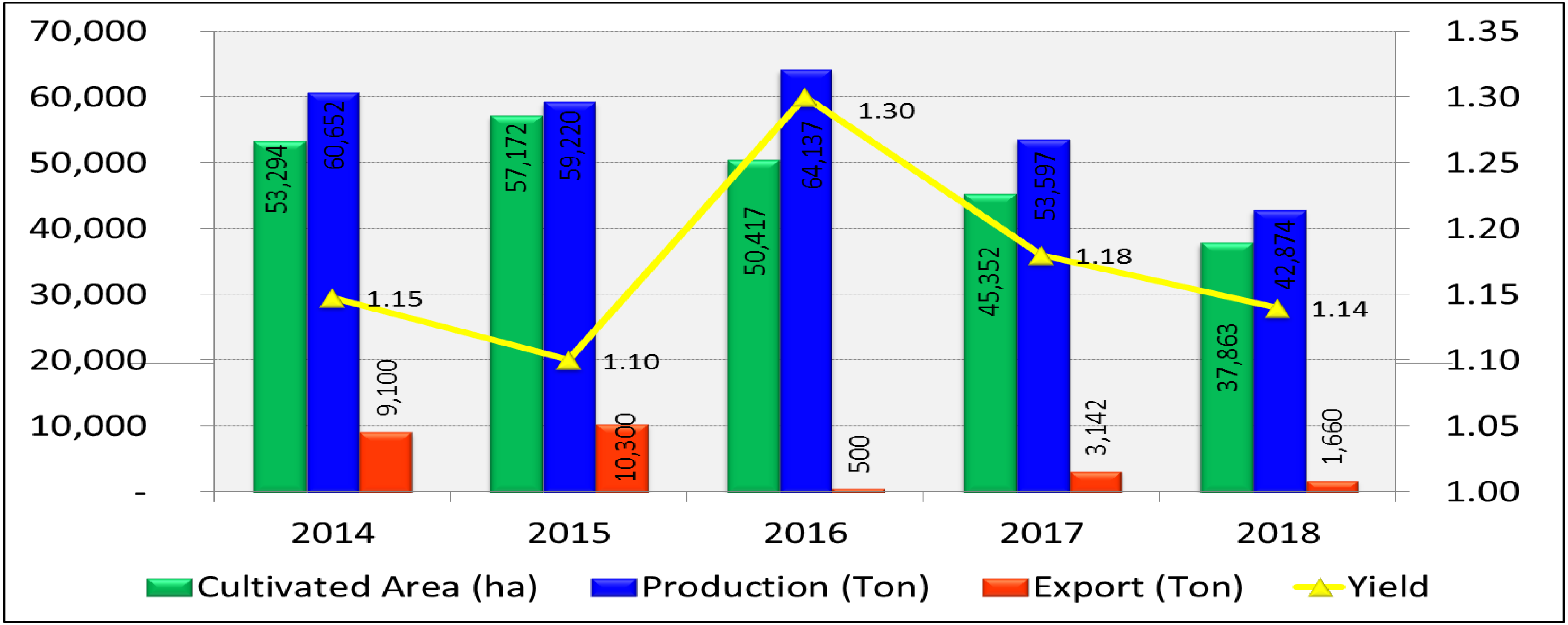
4. Achievement-Crop Sub-Sector

4.4 Soybean Production and Export



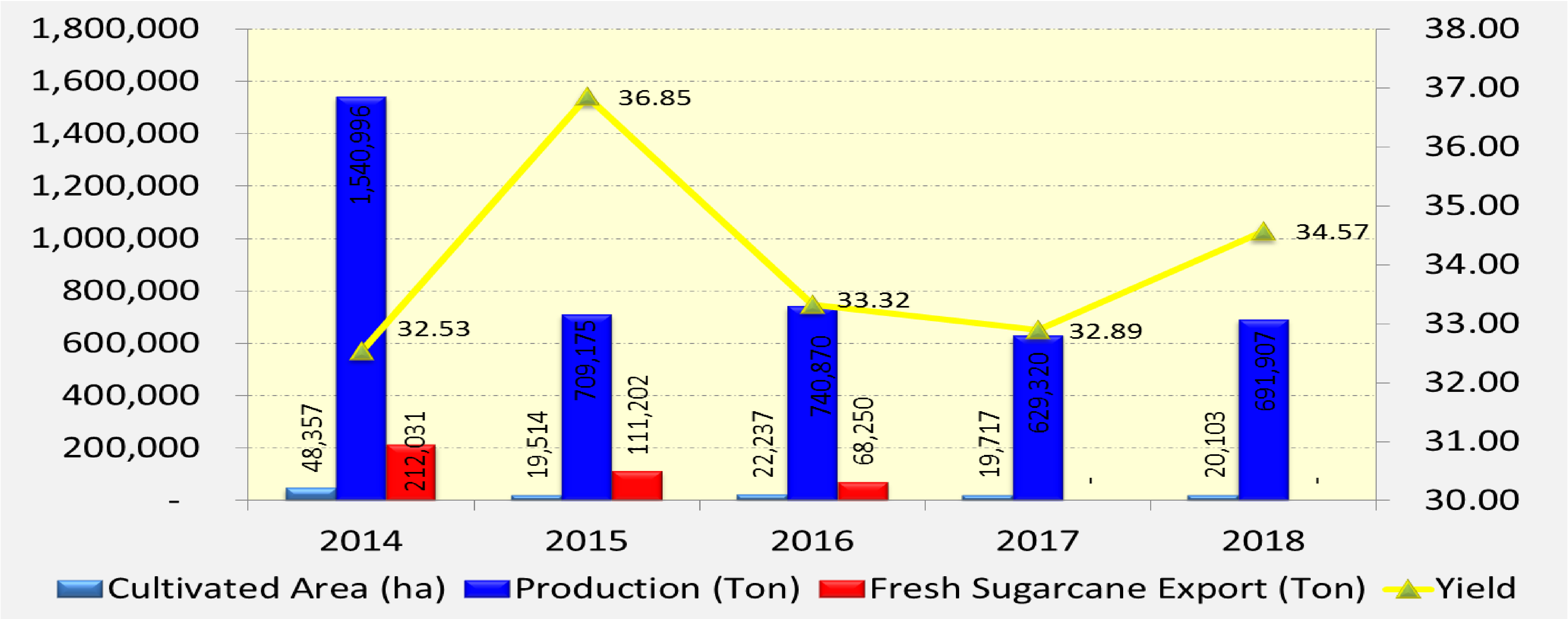
4. Achievement-Crop Sub-Sector

4.5 Mung-bean Production and Export



4. Achievement-Crop Sub-Sector

4.6 Sugarcane Production and Export



5. Estimated Commodities' Supply and Utilization for Year 2017-2020

5.1 Milled Rice (Ton)

Particulars	Milled Rice			
	2017	**2018**	**Esti. 2019**	**Esti. 2020**
Beginning Stock (Households)	5,962,969	1,922,933	5,031,862	8,306,077
Production				
- Paddy basis	10,518,339	10,891,735	11,218,487	11,555,042
- Milled Basis	6,731,737	6,970,710	7,179,832	7,395,227
Import*	N/A	N/A	N/A	N/A
Total Supply	12,694,706	8,893,643	12,211,694	15,701,304
Domestic Use	3,173,126	3,235,556	3,235,556	3,235,556
Formal Export*	635,679	626,225	670,061	716,965
Informal Export	N/A	N/A	N/A	N/A
Ending Stock	8,885,901	5,031,862	8,306,077	11,748,783

5. Estimated Commodities' Supply and Utilization for Year 2017-2020

5.2 Yellow Maize (Ton)

Particulars	Yellow Maize			
	2017	**2018**	**Esti. 2019**	**Esti. 2020**
Beginning Stock (Households)	341,769	1,075,713	1,005,558	1,096,711
Production	1,171,543	1,231,894	1,268,851	1,306,916
- Paddy basis				
- Milled Basis				
Import*	N/A	N/A	N/A	N/A
Total Supply	1,513,312	2,307,607	2,274,408	2,403,627
Domestic Use	268,914	1,097,865	959,221	959,221
Formal Export*	168,685	204,184	218,477	233,770
Informal Export	N/A	N/A	N/A	N/A
Ending Stock	1,075,713	1,005,558	1,096,711	1,210,636

5. Estimated Commodities' Supply and Utilization for Year 2017-2020

5.3 Soybean (Ton)

Particulars	Soybean			
	2017	2018	Esti. 2019	Esti. 2020
Beginning Stock (Households)	26,112	8,381	3,231	1,117
Production	73,288	91,766	94,519	97,355
- Paddy basis				
- Milled Basis				
Import*	N/A	N/A	N/A	N/A
Total Supply	99,400	100,147	97,750	98,471
Domestic Use	60,945	58,016	56,566	54,317
Formal Export*	30,074	38,900	40,067	41,269
Informal Export	N/A	N/A	N/A	N/A
Ending Stock	8,381	3,231	1,117	2,885

5. Estimated Commodities' Supply and Utilization for Year 2017-2020

5.4 Sugar (Ton)

Particulars	Sugar			
	2017	2018	Esti. 2019	Esti. 2020
Beginning Stock (Households)	N/A	N/A	N/A	N/A
Production	629,320	691,907	698,826	705,814
- Paddy basis				
- Milled Basis				
Import*	N/A	N/A	N/A	N/A
Total Supply	629,320	691,907	698,826	705,814
Domestic Use	561,070	691,907	698,826	705,814
Formal Export*	68,250	-	-	-
Informal Export	N/A	N/A	N/A	N/A
Ending Stock	-	-	-	-

6. Key Challenges in Crop Production

- High production costs and agricultural inputs leading difficulty to compete with imported products,
- Productivity and quality of agriculture products are not responsive to the market's demands and competition in the agriculture market,
- This is no agricultural land zoning based on geographical conditions, and cropping calendars
- Delivery and adoption of new agriculture techniques and best practices are still limited due to shortage of extension officers,
- Lack of human resources and expertise in the implementation and management of activities
- Crop value chain and agribusiness operation are weak due to shortages of wholesale markets schemes, underdeveloped purchasing order schemes, strong dependency on volatile external market prices and lack of commercial contracts.

7. Future Prioritized Actions

- Increase crop productivity for high profit and respond to market demand with improved quality and safety,
- Build capacity of agricultural cooperatives on appropriate technologies, contract farming and investment on agriculture value chains,
- Promote innovative use of agricultural engineering and information technology in agricultural production chains to ensure quality and safety,
- Promote agricultural modernization to achieve high competitiveness by focusing on development and utilization of new production techniques,
- Establish agricultural zooning, especially to generate sufficient information and cropping map to manage and promote agriculture production,
- Research and develop farming technologies with high productivity resilient to climate change and reduction of agriculture land degradation,
- Promote capacity building on sanitary and phytosanitary to ensure effectiveness in inspection, quality insurance and recognition.

THANK!!!

Malaysia

SUPPLY AND DEMAND OF RICE, MAIZE, SOYBEAN AND SUGAR IN MALAYSIA

1 INTRODUCTION

1.1 This report intends to provide an insight into the supply and demand situation of rice, maize, soybean and sugar in Malaysia. It is prepared for the 39th Meeting of the ASEAN Food Security Reserve Board to be held in Bangkok, Thailand from 15-16 August 2019.

2 FOOD SECURITY CONSIDERATIONS

2.1 At present, food security issue is the main focus agenda of the world. This is due to several factors such as rising prices at the global manufactures of agricultural inputs, climate change, limited resources, competing uses of commodities for bio-fuel and increased demand due to the increase in population that affect the food supply. Today, Malaysia's importation of food is still relatively high figure.

2.2 In 2018, the total import of food items by Malaysia was USD12.035 billion as compared to the total export of food items of USD7.56 billion. Import of food items under the classification of cereal and cereal preparations was USD1.70 billion as compared to exports of USD0.89 billion. For items under the classification of sugar, sugar preparations and honey, the total import was USD0.91 billion as compared to export of only USD0.19 billion. Import of rice, the sole staple food for

Malaysians, amounting to USD0.39 billion in 2018 while import of maize (excluding sweet corn) was USD0.33 billion.

2.3 Due to the increasing food import bills, Malaysia has formulated a National Agrofood Policy. The National Agrofood Policy (NAP) from 2011 to 2020, focusing on increasing efficiency of the agrofood industry along the value chain so that this industry will be more productive, competitive and knowledge intensive. New approaches which include eight main ideas have been identified to support the transformation process of the agrofood industry.

2.4 One of the main ideas is an efforts to ensure food security, safety and affordability will be continued through increasing production and productivity programmes. In this regard, long-term planning efforts will be focused on the following strategies:

- increase food production and supply;
- improve access to food;
- stabilize food prices; and
- ensure food safety and nutrition.

3 <u>STATUS OF MAJOR FOOD COMMODITIES</u>

3.1 **RICE**

3.1.1 In 2018, the domestic rice production was 1.766 million metric tonnes, with an decrease about 1.6% from 2017. The domestic production can meet approximately 70.6% of total rice consumption. The shortfall was met by the importation

of rice amounting to 0.797 million metric tonnes, 9% from the previous year.

3.2 **MAIZE**

3.2.1 To meet maize demands, Malaysia resorts to import about 1.571 million metric tonnes in 2018 (in the form of grains, bran and other maize residues).

3.3 **SOYBEAN**

3.3.1 Soybean is also not grown in Malaysia. Thus, Malaysia imports its requirements of soybean for vegetable protein, edible oil and animal feed from various countries including Argentina, USA, India, Thailand and Taiwan amounting 1.380 million metric tonnes in 2018.

3.4 **SUGAR**

3.4.1 Malaysia heavily depending on imports for sugar. Total importation in 2018 was about 2.264 million metric tonnes to support domestic demand.

4 CONCLUSION

4.1 As a net importer of food, Malaysia has undertaken strategies and programmes to increase food production and enhance food security situation.

MINISTRY OF AGRICULTURE AND AGRO-BASED INDUSTRY MALAYSIA

Table : Estimated Commodities' Supply and Utilization for Year 2016-2019

Country :

Unit : 1,000 metric tons

Particulars	Rice				Maize				Soybean				Sugar			
	2016	2017	2018	2019	2016	2017	2018	2019	2016	2017	2018	2019	2016	2017	2018	2019
Beginning Stock	564.00	563.00	552.00	-	-	-	-	-	-	-	-	-	-	-	-	-
Production	1767.00	1795.00	1766.00	-	64.90	N/A	N/A	-	-	-	-	-	-	-	-	-
- Paddy basis	2740.00	2784.00	2716.90	-	[redacted]											
- Milled Basis	-	-	-	-												
Import*	748.00	726.00	797.00	-	N/A	179.00	151.70	-	796.00	1605.00	1379.60	-	1863.00	2154.00	2263.80	
Total Supply	3079.00	3084.00	3115.00	-	64.90	179.00	151.70	-	796.00	1605.00	1379.60	-	1863.00	2154.00	2263.80	
Domestic Use	2516.00	2532.00	2548.00	-	N/A	N/A	N/A	-	-	-	-	-	-	-		
Export*	153.00	164.00	196.00	-	-	-	-	-	70.00	48.00	24.70	-	85.00	264.00	213.70	
Ending Stock	563.00	552.00	567.00	-	N/A	N/A	N/A-	-	-	-	-	-	-	-	-	

Notes : 1. Data provided would be used for ASEAN food situation analysis
2. Please fill in the table with complete data
3. in case that the data is not available or nil,please specify
* Export/Import 2018 : January - May or June 2018 (Whichever available)

N/A: The trade data 2018 (in metric tonnes) is unavailable. The final data will only be released by the Department of Statistics Malaysia (DOSM) earliest by October 2019.

Notes:
1. There is no production for Maize, Soybean and Sugar.
2. Production, Import and Export Data are referred to as in Agrofood Statistics.
3. Beginning Stock, Domestic Use and Ending Stock are forecast data extracted from National Agrofood Policy.

Compatibility Report for Estimated Commodities Supply and Utilization for 2016-2019.xls
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COUNTRY REPORT: MALAYSIA

SUPPLY AND DEMAND SITUATION ON RICE AND OTHER COMMODITIES 2016-2018

www.moa.gov.my

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KEMENTERIAN PERTANIAN DAN INDUSTRI ASAS TANI MALAYSIA

IMPORT OF FOOD ITEMS

YEAR	IMPORT (USD billion)	EXPORT (USD billion)
2018	12.035	7.56

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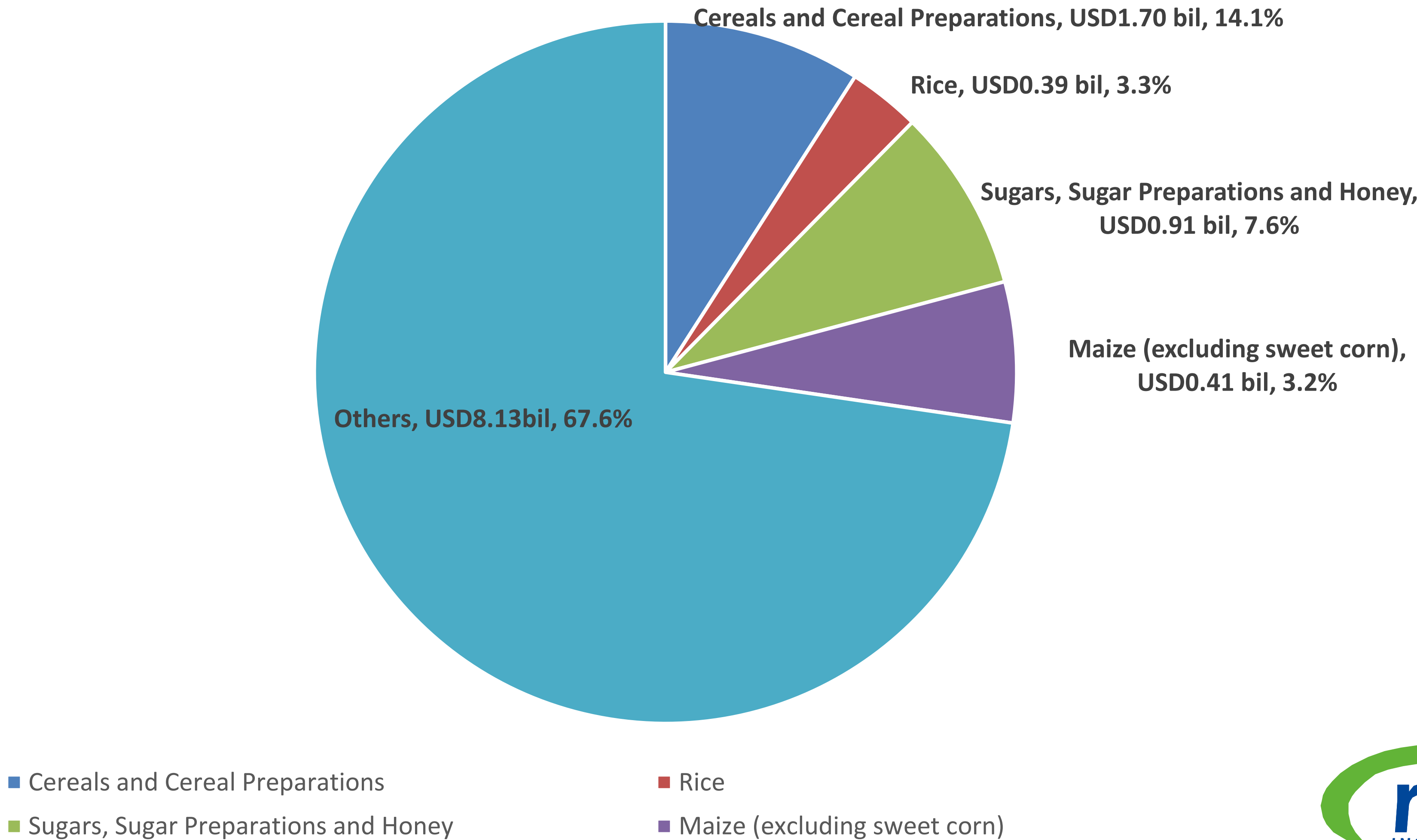
IMPORT OF FOOD ITEMS



Source: Agrofood Trade Data

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KEMENTERIAN PERTANIAN DAN INDUSTRI ASAS TANI MALAYSIA

Status Of Major Food Commodities

<u>Rice</u>

- In **2018**, the domestic rice production was **1.766 million metric tonnes**
- decrease about **1.6%** from **2017**
- The domestic production can meet approximately **70.6%** of total rice consumption.
- The shortfall was met by the importation of rice amounting to **0.797 million metric tonnes, an increase of 9.0% from the previous year**.

<u>Maize</u>

- To meet maize demands, Malaysia resorts to import about **1.571 million metric tonnes in 2018** (in the form of grains, bran and other maize residues).






Status Of Major Food Commodities

Soybean

- Soybean is also not grown in Malaysia.
- Malaysia imports its requirements of soybean for vegetable protein, edible oil and animal feed from various countries including Argentina, USA, India, Thailand and Taiwan **amounting 1.380 million metric tonnes in 2018**.

Sugar

- Malaysia heavily depending on imports for sugar.
- Total importation in **2018 was about 2.264 million metric tonnes** to support domestic demand.






Status Of Major Food Commodities

As a net importer of food, Malaysia has undertaken strategies and programmes to increase food production and enhance food security situation.

NOTE:

1. *The latest official trade data available is for year 2018.*

*2. The trade data for year 2018 is yet to be finalized by the Department Of Statistics Malaysia (DOSM) and the **final data will only be ready earliest by October 2019**.*






PADDY FIELD AREA IN MALAYSIA

	PLANTED AREA	PADDY PRODUCTION
MALAYSIA	684,979 ha	2,741,046 mt (Average: 4.002 mt/ha)
GRAINARY AREA	425,929 ha (62.2%)	2,053,695 mt (74.5%) (Average: 4.822 mt/ha)
NON GRAINARY AREA	259,049 ha	738,198 mt (26.9%) (Average: 2.85 mt/ha)

Source: CCS Data 2018, Department of Agriculture, Malaysia

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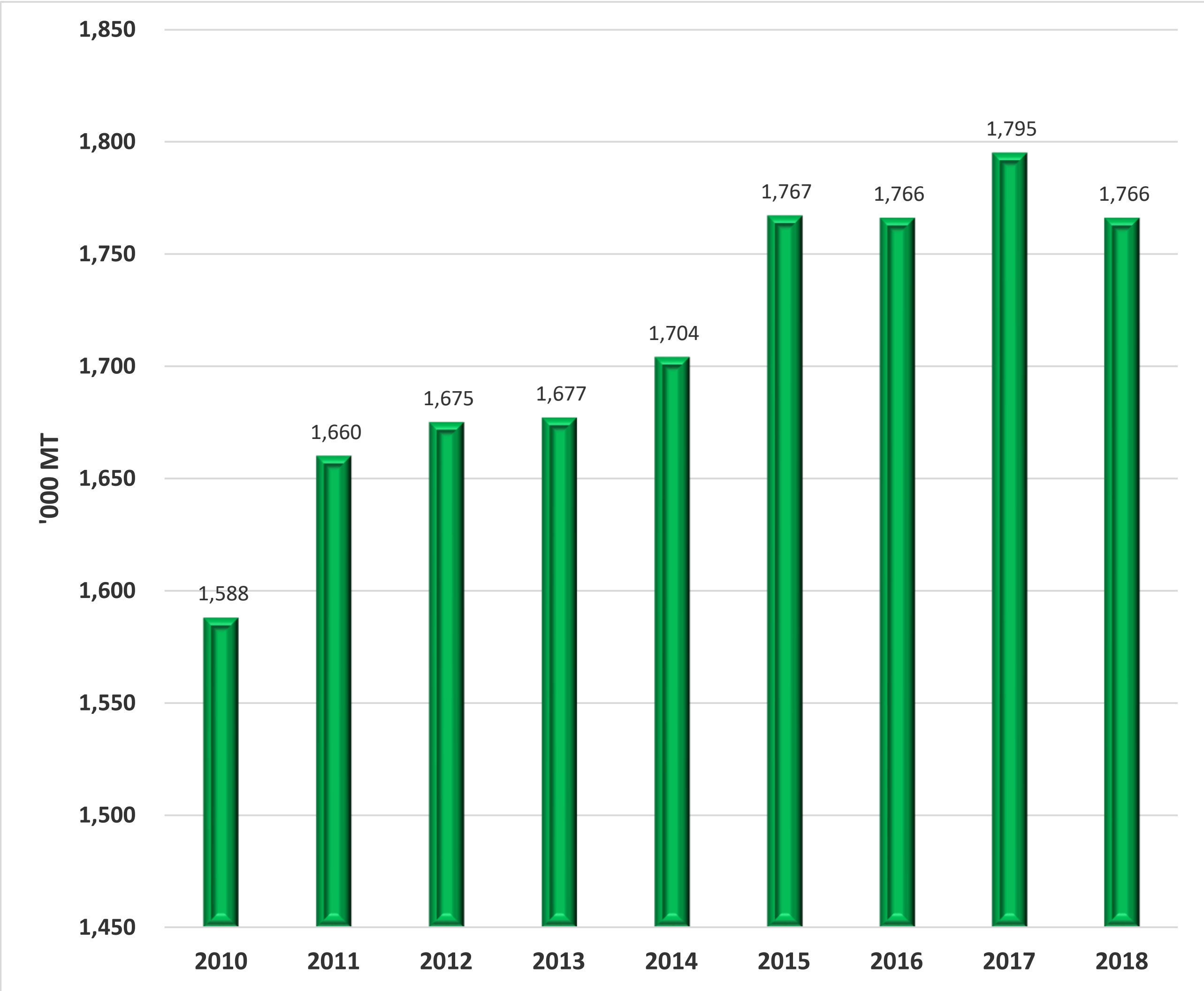
RICE PRODUCTION (METRIC TONNES)



Source: Agrofood Statistics 2018

In 2018, the domestic rice production was 1.766 million metric tonnes.

The domestic production can meet approximately 70.6% of total rice consumption .

SSL (2018): 70.6%

30% IMPORT

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WAY FORWARD:
PROGRAMMES TO ENHANCE PRODUCTIVITY OF RICE

Increase of productivity and quality of paddy & rice

Productivity increase to 4.8 MT/ha and 80% SSL by 2020

Use of certified seeds (high quality seeds)/ introduced of new variety seeds

Restructuring the subsidies program

Introducing the competitive rice market through new policies

Empowerment of the extension activities

Land consolidation program

Strengthening the post harvest losses (PHLs) activities by implementing enforcement

Improve the efficiency of agricultural input through “Soil Profiling Program”

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THANK YOU

Myanmar

THE 39th ASEAN FOOD SECURITY RESERVE BOARD MEETING

August 2019

COUNTRY REPORT: Myanmar

Introduction

Myanmar is an agriculture-based country which is rich in natural resources, land and water together with favorable weather conditions for crop production. Agriculture sector is the backbone of country's economy. The agriculture sector including livestock and fisheries contributes to 25.6% of gross domestic product (GDP), accounts for 22.4% of total export earnings and employs 61.2% of the labor force. The largest agri-businesses are rice, bean and oil mills. Agriculture also clearly plays a key role in the country's food security. The first objective of Ministry of Agriculture, Livestock and Irrigation (MOALI) is thus to ensure food and nutrition security and food safety. The supply and demand situation for four commodities (rice, maize, soybean and sugarcane/sugar) in 2018-19 is as follow.

1. Rice

Rice is grown during the monsoon and summer seasons in four growing zones: the delta, dry zone, coastal zone, and mountainous areas. About 85% of the annual production is harvested during the wet season and the remaining 15% during the dry season. The area sown to rice and harvested area increased from 6 million hectares in 1995 to over 7 million hectares in 2018. Rice production showed a similar increasing trend because of the expansion of irrigated areas and the government program to promote the use of high-yielding varieties and fertilizers. In 2018-2019, total sown areas of rice have 7.2 M ha, comprising 6.1 M ha under wet season rice and 1.1 M ha under dry season rice with yields averaging at least 3.9 t ha^{-1}. Production was reached 27.95 million ton in 2018-2019. In order to calculate utilization and surplus on rice, MOALI estimated that seed utilization by farmers is 98.8 kg/ha and waste and postharvest loss is 148 kg/ha. Moreover, the annual per capita consumption of the Myanmar people is estimated at 155 kg/year. Therefore, total utilization and surplus of milled rice are 10.92 million ton and 6.44 million ton respectively in 2018-19. Although the last year has the highest export volume on rice as of over 4 million ton, the milled rice export is 2.38 million MT in 2018-19. Therefore, the Department of Agriculture (DOA) reconsiders Myanmar's rice policies to fulfil its targets from the current rice production, in terms of quantity and quality, enabling a more open trade policy regime, but based largely on current infrastructure.

2. Maize

In Myanmar, maize is an important cereal after rice and usually grown in the whole country. It is important crop for animal feed for domestic livestock farms and export market.

Myanmar has exported its maize mainly to China. Hybrid maize was grown 70 % of maize area, Maize yield have increased double by introducing hybrid corn. Maize sown area 0.52 million ha and production is 2.0 MT with the average yield of 3.88 t ha^{-1} in 2018-2019. Domestic corn consumption is expected to grow for the growth of Myanmar's livestock industries, especially poultry and swine. Most of the corn supplies are delivered to feed mills located in Rangoon, Mandalay, and Shan State. In the meantime, export demand from China will likely remain strong. In 2018-2019, export is 1.06 million tons. According to government and trade sources, about 95% of Myanmar's maize exports take place along the border between Myanmar and China.

3. Soybean

Myanmar is second largest global exporter for pulses, and is standing as a leading producer and exporter for pulses among ASEAN countries. Pulses have occupied over 21% of the total crop cultivated. Pulses security is rising up to 549% in Myanmar. However, soybean is grown in small areas (few portion in monsoon and larger portion in post-monsoon), and it is mostly grown in hilly region. In 2018-2019, the soybean-sown area was 0.14 million ha and production was 0.23 million tons with the average yield of 1.5 t ha^{-1}.

4. Sugarcane

Sugarcane is one of the major industrial crops under cultivation in Myanmar. Nowadays, it has been changed 65% of old variety planted area with advanced varieties. In 2018-19, the cultivated area of sugarcane was 180 thousand ha and the production was 11.4 million tons with the average yield of 63.3 t ha^{-1}. Sugarcane gives a good profit for cane growers because of high domestic demands. The domestic consumption of sugar in 2018-19 was estimated to 715 thousand tons which was higher than production of 608 thousand tons. However, in term of sugar, Myanmar has both export and import. In 2018-19, the sugar export was 189 thousand tons and the import was 296 thousand tons.

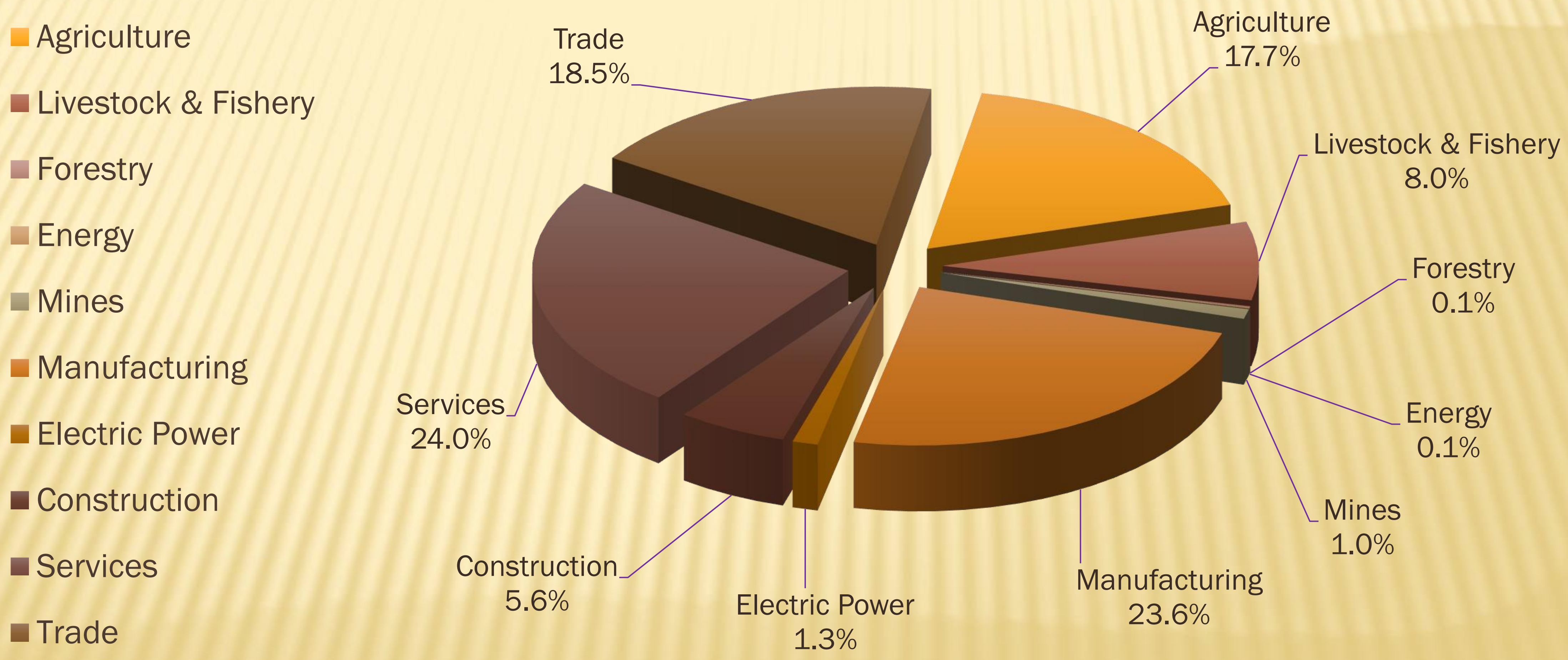
Ministry of Agriculture, Livestock and Irrigation

Department of Agriculture

MYANMAR’S FOOD SECURITY ON RICE AND OTHER COMMODITIES IN 2018-19

Report on the 39th Meeting of AFSRB, 15-16 August, 2019 in Thailand

Myanmar Economy and Agriculture Sector (2017-18)



Role of Agriculture in Myanmar

Agriculture including livestock and fishery

- Contribute 25.6% of GDP
- Contribute 24.4% of total export earnings in 2017-18
- Employ 61,2% of the labour force.

Vision and Mission of MOALI

Vision: An inclusive, competitive, food and nutrition secured and sustainable agricultural system contributing to the socio-economic well-being of farmers and rural people and further development of national economy

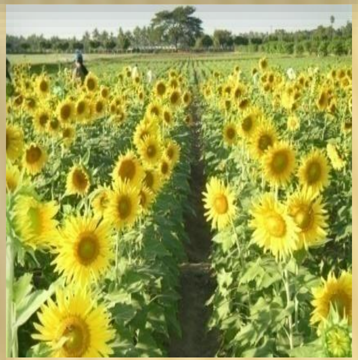
Mission: To enable rural population and agribusiness enterprises earning profit from production and trade of diverse, safe and nutritious foods and agricultural products using innovative and sustainable production, processing, packaging, logistics and marketing technologies to meet the growing domestic and global demands.

Major Crops Production

- Paddy
- Maize
- Groundnut
- Sesame
- Sunflower
- Black gram
- Green gram
- Pigeon pea
- Cotton
- Sugarcane





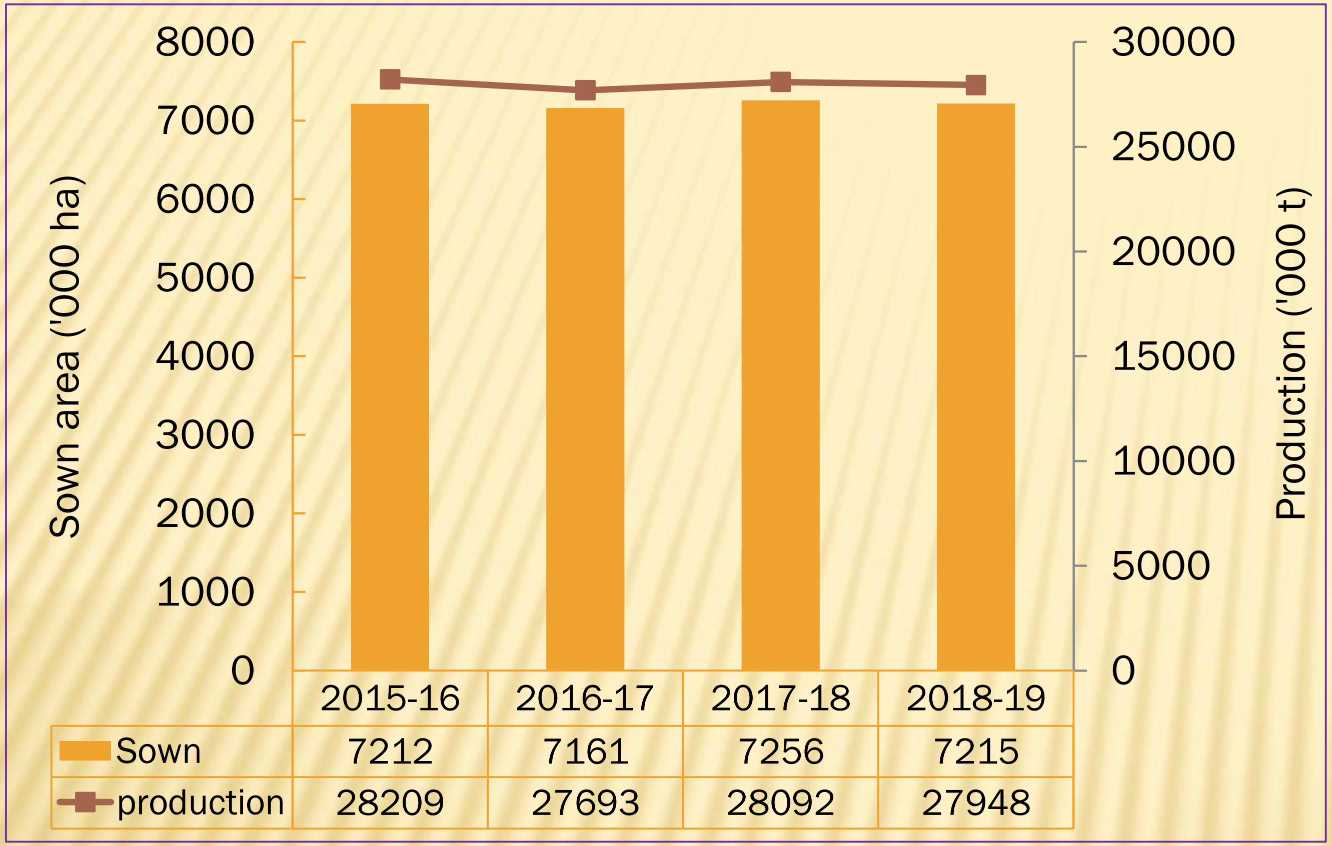


Supply and Demand Situation for Rice and Other Commodities in 2018-19

RICE

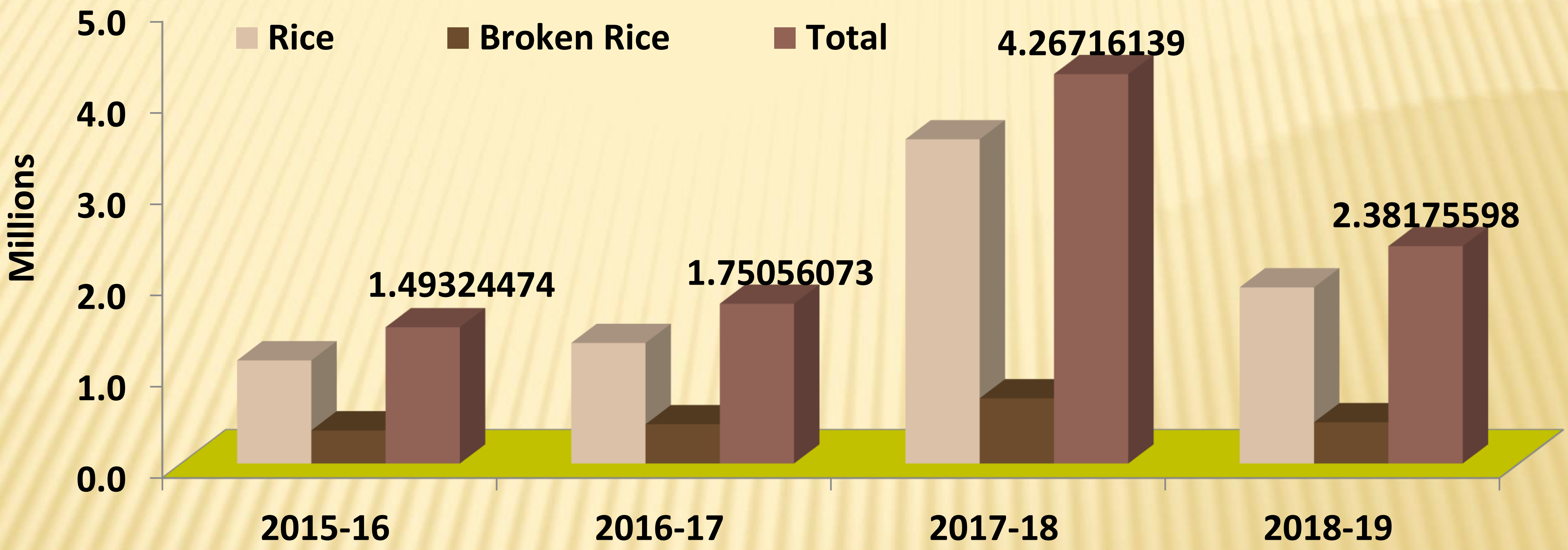
- Rice is a major export crop as well as the staple food of Myanmar people.
- Over 70% of people in rural areas grow rice.
- In 2018, total sown area = 7.2 M ha (Monsoon = 6.1 M ha, Summer = 1.1 M ha)
- Average yield = 3.9 t ha^{-1}
- According to a survey done by MRF & YAU in 2016, the annual per capita consumption of the Myanmar people is estimated at 155 kg/year.

Paddy Production



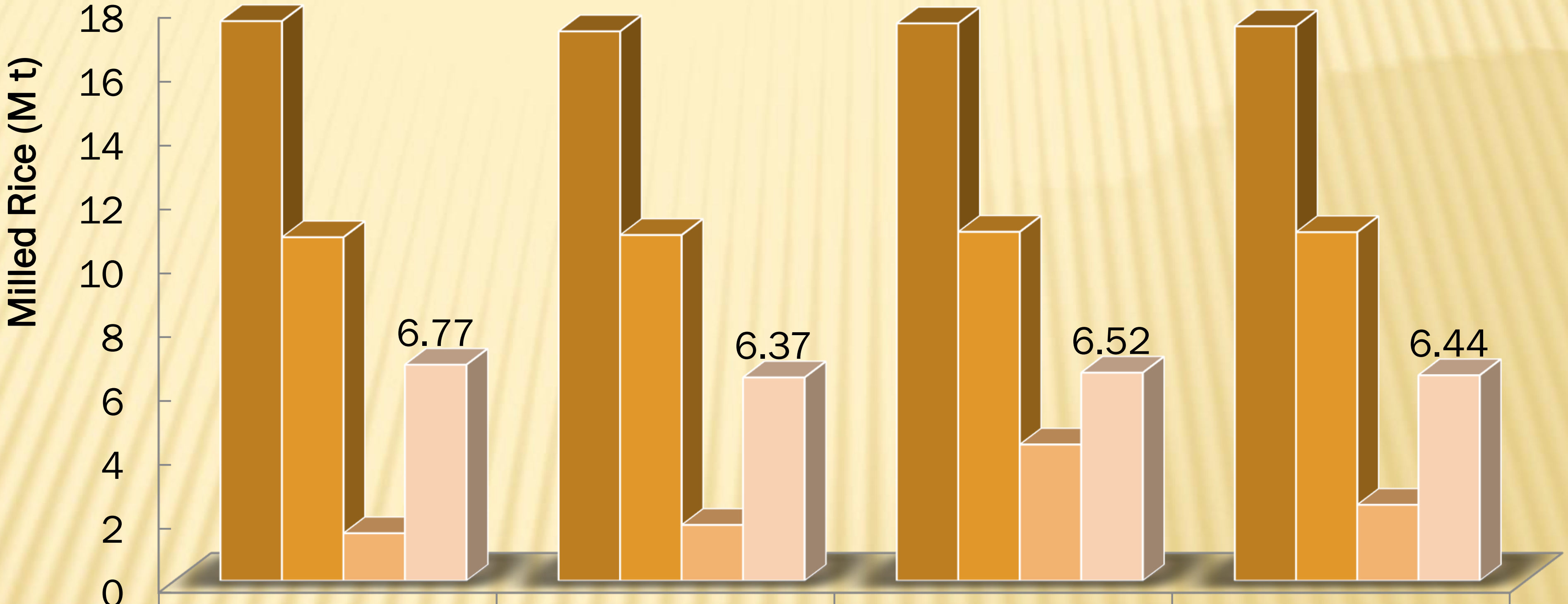
Rice Production		2015-16	2016-17	2017-18	2018-19
Monsoon	Sown	6.22	6.17	6.16	6.1
	Yield	3.84	3.78	3.75	3.75
	Production	23.46	22.95	22.8	22.59
Summer	Sown	0.99	0.99	1.1	1.11
	Yield	4.8	4.78	4.83	4.82
	Production	4.75	4.74	5.29	5.36
Total	Sown	7.21	7.16	7.26	7.21
	Yield	3.97	3.92	3.92	3.92
	Production	28.21	27.69	28.09	27.95

Rice Export



Exporting	2015-16	2016-17	2017-18	2018-19
Rice	1130224.32	1320802.88	3552818.14	1929842.26
Broken Rice	363020.42	429757.85	714343.25	451913.72
Total	**1493244.74**	**1750560.73**	**4267161.39**	**2381755.98**

Supply and Demand on Rice (*in the form of milled rice*)



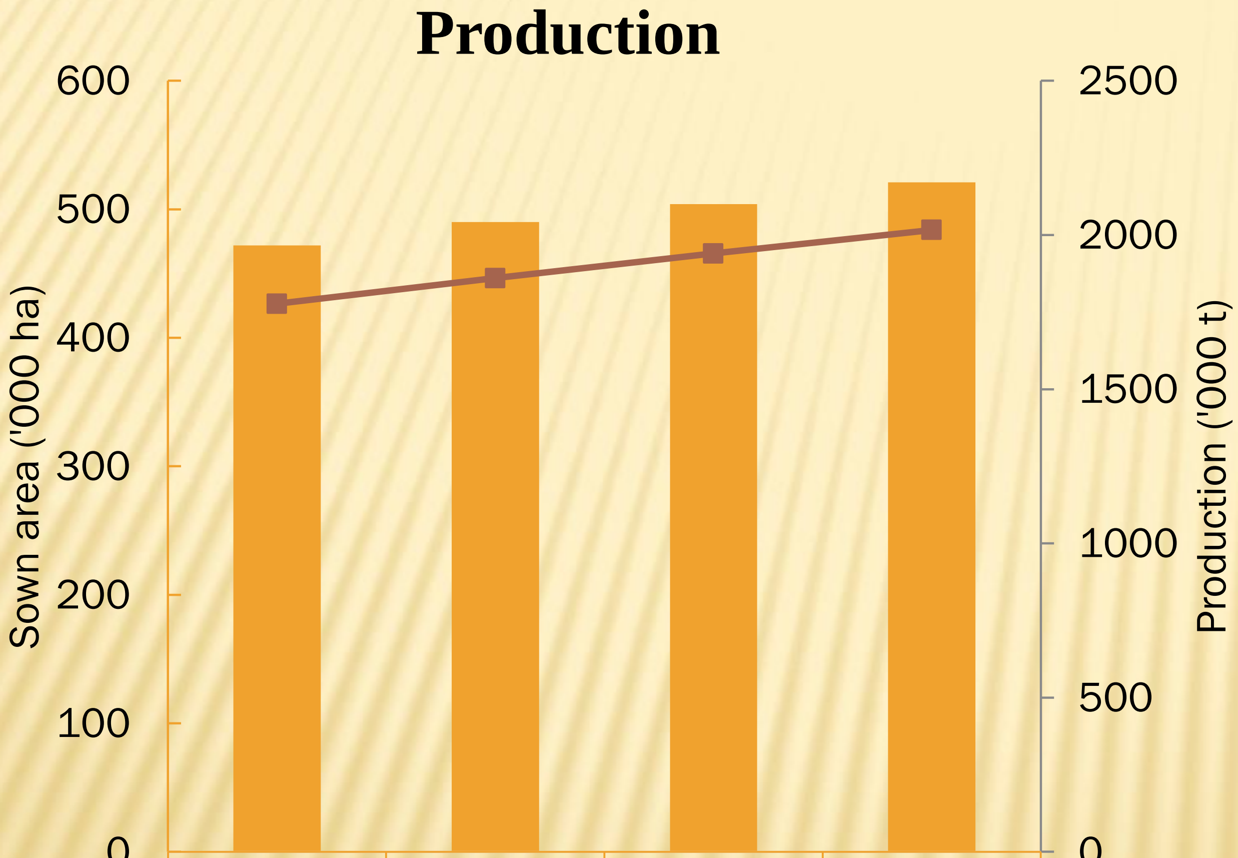
	2015-16	2016-17	2017-18	2018-19
Production	17.52	17.2	17.45	17.36
Local Utilization	10.76	10.83	10.93	10.92
Export	1.49	1.75	4.27	2.38
Surplus	6.77	6.37	6.52	6.44

MAIZE

- Maize is the second most important cereal after rice.
- Grown mainly for animal feed, for domestic livestock farms and for export.
- In 2018, total sown area = 0.52 M ha, and Production = 2.0 M t
- Average yield = 3.88 t ha^{-1}
- Over 30% of the total maize sown area utilize hybrid maize varieties.



Maize Production and Export

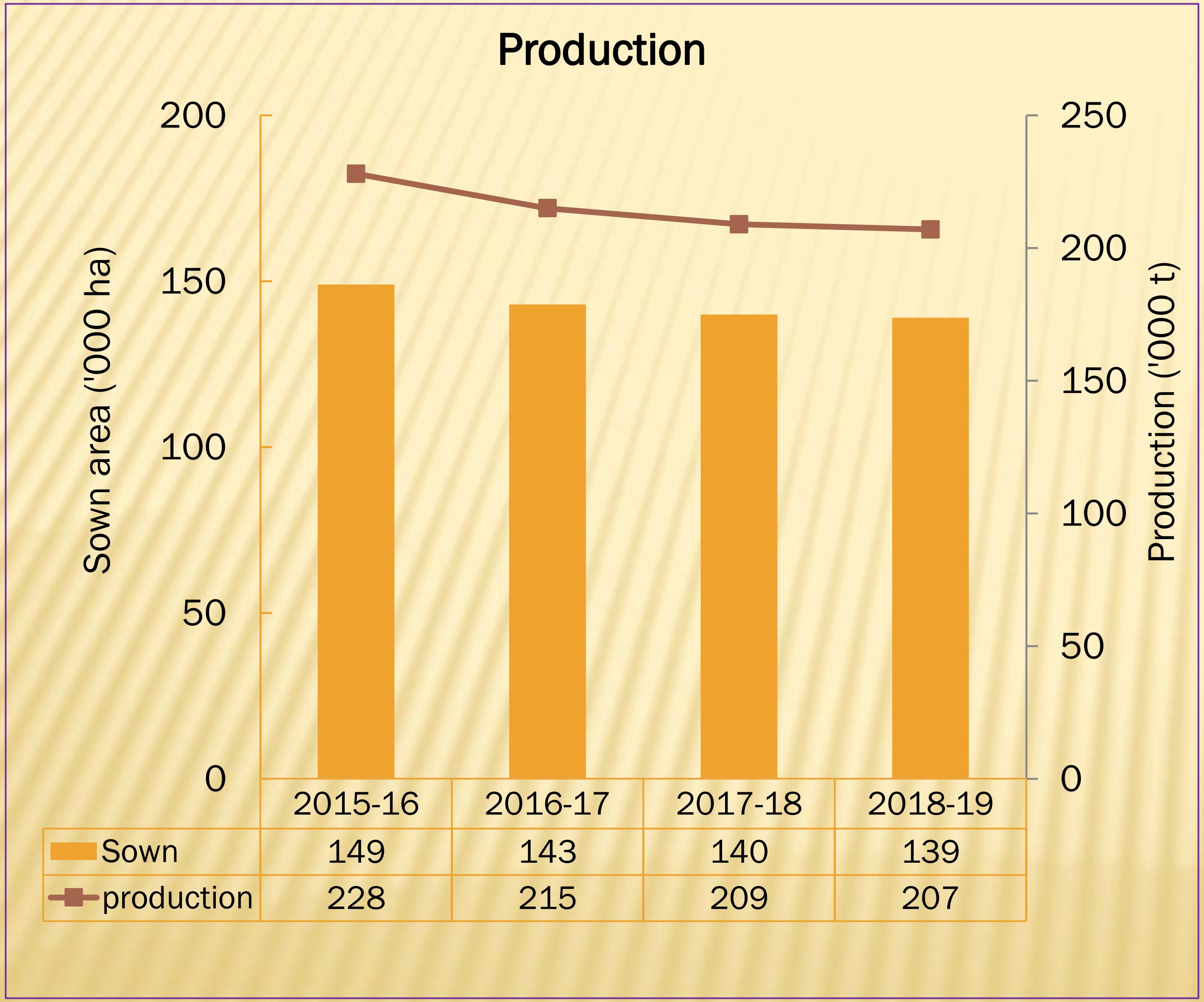


	2015-16	2016-17	2017-18	2018-19
Sown	472	490	504	521
production	1777	1860	1940	2016

SOYBEAN

- Myanmar is second largest global producer of pulses.
- Occupy over 21% of the total crop cultivated.
- Soybean is grown in small areas (few in monsoon and larger in post-monsoon)
- In 2018, sown area = 0.14 M ha, and production = 0.23 M t.
- Average yield = 1.5 t ha^{-1}
- About 30% surplus

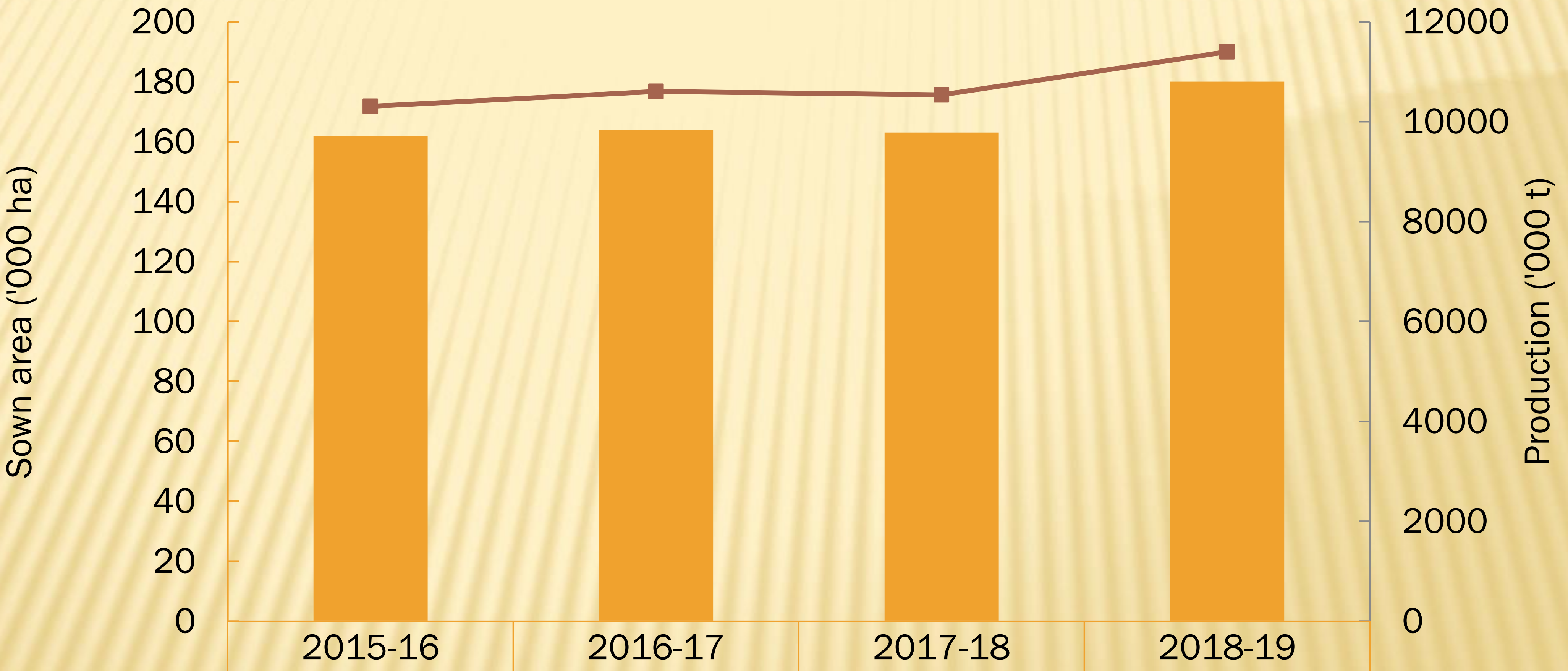
Soybean Production and Export



SUGARCANE & SUGAR

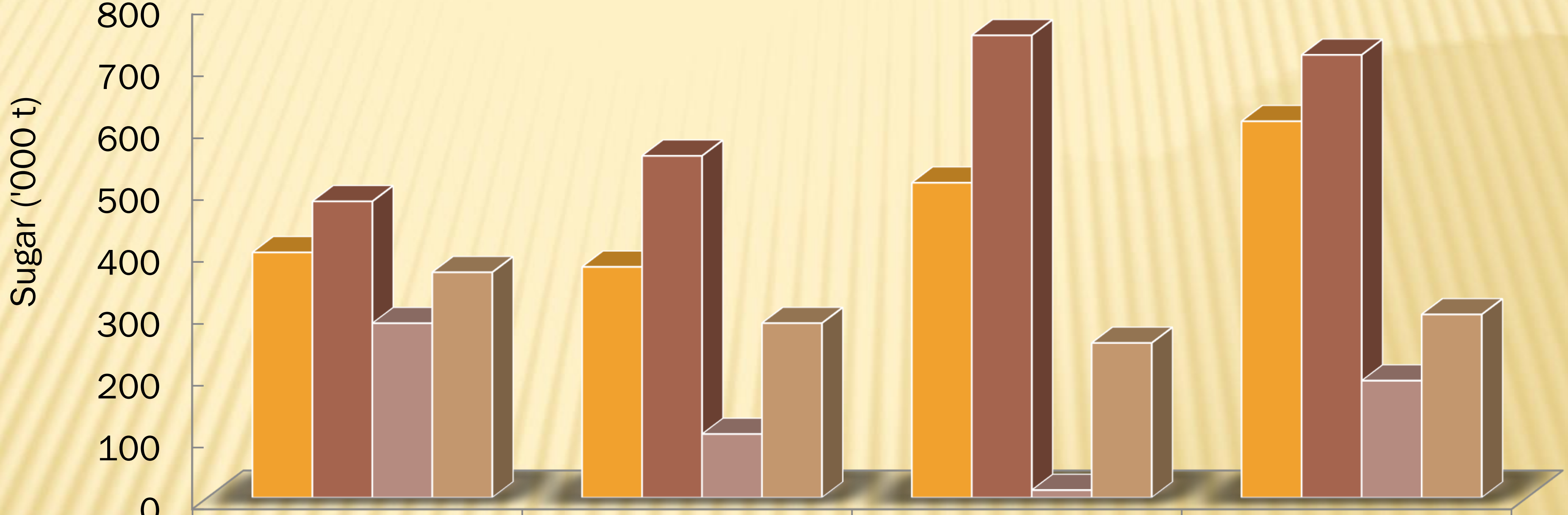
- Sugarcane is one of the major industrial crops under cultivation in Myanmar.
- Changed 65% of old variety planted area with advanced varieties.
- In 2018, total sown area = 0.18 M ha, and Production = 11.4 M t
- Average yield = 63.3 t ha^{-1}
- Give a good profit for cane growers because of high domestic demands.

Sugarcane Production



	2015-16	2016-17	2017-18	2018-19
Sown	162	164	163	180
production	10305	10605	10536	11397

Sugar Utilization



	2015-16	2016-17	2017-18	2018-19
Production	396524	373125	508969	608244
Domestic	478899	552454	746900	715368
Export	282003	102863	12185	189134
Import	364378	282192	250116	296258

ESTIMATED COMMODITIES SUPPLY AND UTILIZATION

Particulars	Rice (Million ton)			Maize (Million ton)			Soybean ('000 ton)			Sugar ('000 ton)		
	2016-17	2017-18	2018-19	2016-17	2017-18	2018-19	2016-17	2017-18	2018-19	2016-17	2017-18	2018-19
Beginning Stock												
Production				1.86	1.94	2.02	214.54	209.19	206.66	373.13	508.97	608.24
- Paddy basis	27.26	27.65	27.51									
- Milled Basis	17.20	17.45	17.36									
Import*										282.19	250.12	296.26
Total Supply												
Domestic Use	10.83	10.93	10.92							552.45	746.90	715.37
Export*	1.75	4.27	2.38	1.29	1.43	1.06	1.76	2.02	2.93	102.86	12.19	189.13
Ending Stock												

Notes : 1. Data provided would be used for ASEAN food situation analysis

2. Please fill in the table with complete data

3. in case that the data is not available or nil,please specify

* Export/Import 2019 : January - May or June 2019 (Whichever available)

CHALLENGES IN AGRICULTURE SECTOR

- Strengthening Agriculture Policy and Planning
- Technology innovation
- Environment and Climate Change
- Limited facilities for postharvest harvest and processing
- Insufficient Farm Credit
- Strengthening Research and Extension
- Agribusiness and Value Chain
- Migration, Landlessness and Mechanization
- Infrastructure Development and Connectivity

CONCLUSION

- In Myanmar, through transformation of dynamic rice based farming system and effective resource management in order to assure food production and, farmers can enjoy the economic benefits.
- Ensure to have enough rice to feed our 52 million people as well as to produce more for the growing population.
- It is also our desire to contribute in ensuring that the world has enough rice supply to feed the increasing population.
- In this year, export has slightly decreased on that commodities.
- Therefore, it is also important factor to assure the product quality and relevant markets.


THANK YOU VERY MUCH

Philippines

The Philippines' Food Situation Report for Rice, Corn, Sugar and Soybean CY 2017 – 2020

39th Meeting of the ASEAN Food Security Reserve Board (AFSRB)
Bangkok, Thailand
15 - 16 August 2019

I. PADDY/RICE

Production forecast in milled rice equivalent for calendar year 2019 is at 12,929 TMT, which translates to an increase of about 4% compared from last year's report of 12,393 TMT (Table 1). The anticipated increase in production for this year could be attributed to construction of new irrigation facilities, continued use of high yielding varieties and availability of subsidized seeds from the government.

Gains in paddy production is seen to continue in CY 2020 at 13,187 MT. The country's ending stock inventory for calendar year 2019 is foreseen at 4,391 TMT.

PADDY/RICE (continuation)

Farmgate price of paddy in the first half of 2019 posted an average of US$ 0.37/kg or ₱18.87/kg, indicating a decrease of 10.86 % compared to same period last year at US$ 0.41/kg or ₱20.87/kg. Of the period in review, the lowest recorded farmgate price was in June 2019 at US$ 0.35 or ₱17.91/kg.

On the other hand, the average wholesale price of rice for the first half of 2019 is pegged at US$ 0.79 or ₱40.38/kg, down by 0.72 % than the prevailing average price of US$ 0.78/kg or ₱40.67/kg for the same period of last year.

The continuous arrival of imported rice following the enactment of rice tariffication law in March 2019 is further seen to tame down domestic rice prices in the 2nd Semester of 2019.

II. MAIZE/CORN

Corn production for calendar year 2019 is estimated to reach 8,000 TMT or an increase of 2.96% from last year’s level of 7,770 TMT. Similar to rice, the probable increment in production can be attributed to the early harvest as farmers planted earlier than usual due to onset of rainfall and sufficient soil moisture content. In addition, the higher demand and increase of buying price offered by feed millers encouraged more farmers to produce corn for this year.

III. SOYBEAN

The Philippines' soybean production annually is very small, about less than 1 TMT. Thus, the country is highly dependent on importation for our domestic needs. The estimated volume of soybeans which the Philippines imported last CY 2017 is 191 TMT in which the bulk of supply is utilized for processing feed and food.

Soybean production is concentrated only in the provinces of Surigao del Sur and Negros Oriental. In order to minimize the import dependence, the government initiated the development of soybean industry to produce high yielding varieties in some other parts of the country.

IV. SUGAR

A slight contraction in the production of sugar at 2,072 TMT is projected for CY 2019 which is down by 0.53% compared to last year's production at 2,083 TMT.

The decrease in production may be attributed to dry conditions in some plantation areas caused by El Niño.

TABLE 1

ESTIMATED COMMODITIES' SUPPLY AND UTILIZATION FOR YEAR 2017-2019

COUNTRY: **Philippines** Unit: 1,000 metric tons

PARTICULARS	RICE				MAIZE			
	2017	2018	2019	2020	2017	2018	2019	2020
Beginning Stock	2,765	2,290	2,958	4,390	382	330	410	
Production								
- Paddy Basis	19,276	19,066	19,890	20,288	7,915	7,770	8,000	
- Milled Basis	12,607	12,393	12,929	13,187				
Import	885	1,536	2,016		650	750	750	NO AVAILABLE DATA
Total Supply	**16,257**	**16,219**	**17,902**	**13,729**	**8,947**	**8,850**	**9,160**	
Domestic Use	13,967	13,261	13,512	13,729	8,617	8,440	8720	
Export	0	0	0	0				
Ending Stock	2,290	2,958	4,390	3,848	330	410	440	

Notes:
Rice data for 2017 was sourced from the Supply and Utilization Accounts of PSA. Data for 2018 - 2020 was based on the projected estimates of the National Food Authority.
The 2017 production data for Corn/ Maize was obtained from PSA while data on importation and domestic use are sourced from Food and Agriculture Organization; The 2018 and 2019 maize/corn data were also obtained from FAO projected estimates.
There is no 2020 data available from FAO projected estimates or from PSA.

TABLE 1 (continuation)

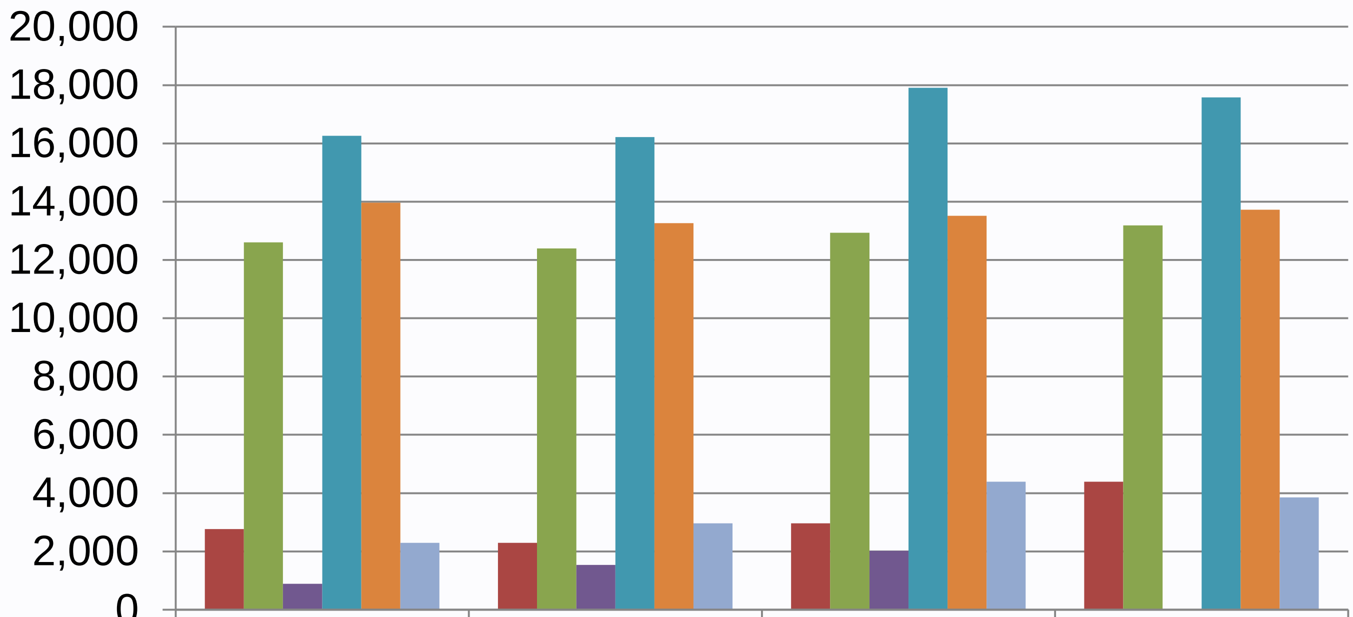
ESTIMATED COMMODITIES' SUPPLY AND UTILIZATION FOR YEAR 2017-2019

COUNTRY: **Philippines** Unit: 1,000 metric tons

PARTICULARS	SUGAR				SOY BEANS			
	2017	2018	2019	2020	2017	2018	2019	2020
Beginning Stock	326	583	444	NO AVAILABLE DATA	0	NO AVAILABLE DATA		
Production	2,500	2,083	2072		0.66			
Import	85	199	286		191			
Total Supply	**2,911**	**2,865**	**2,802**		**192**			
Domestic Use	2,115	2,098	1720		192			
Export	213	323	99		0.00			
Ending Stock	583	444	983		0			

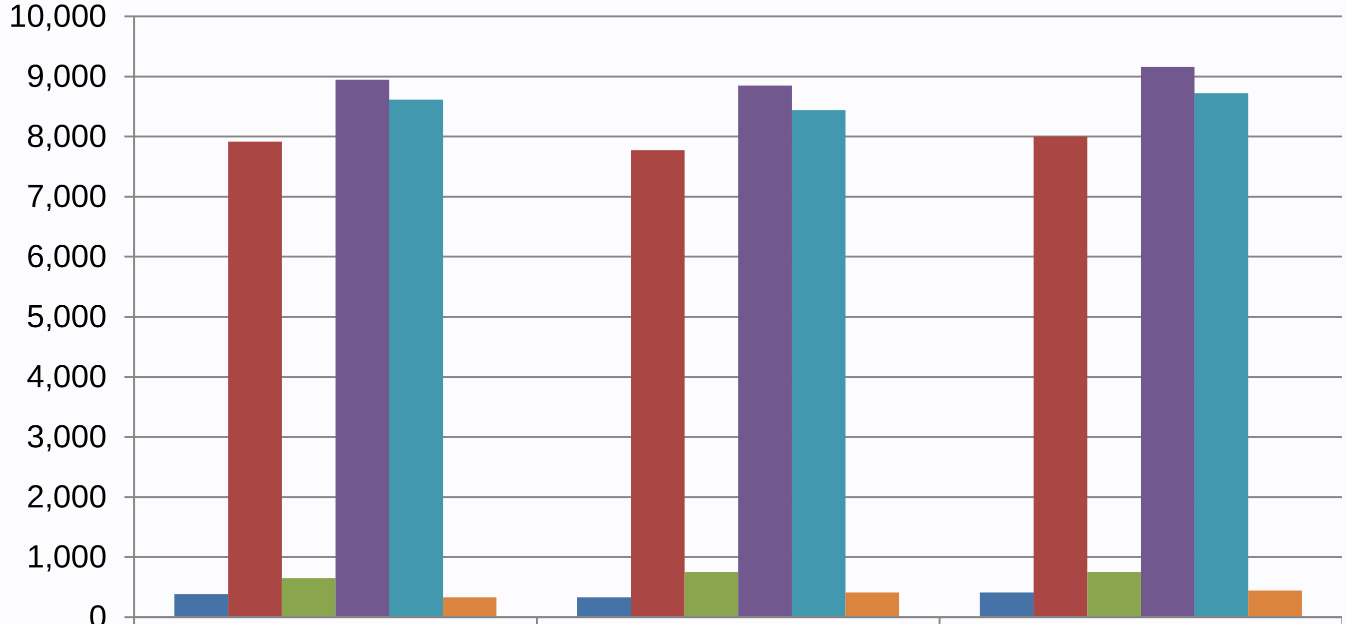
Notes:
Data for sugar is sourced from the Sugar Regulatory Administration
The preliminary estimates of soybean in 2017 was sourced from PSA
2018 and 2019 data for soybeans are not yet available
2020 data for sugar is not available while the 2019 data for sugar is still preliminary

RICE: ESTIMATED SUPPLY AND UTILIZATION, PHILIPPINES
Calendar Year 2017-2020
(In Thousand Metric Ton)



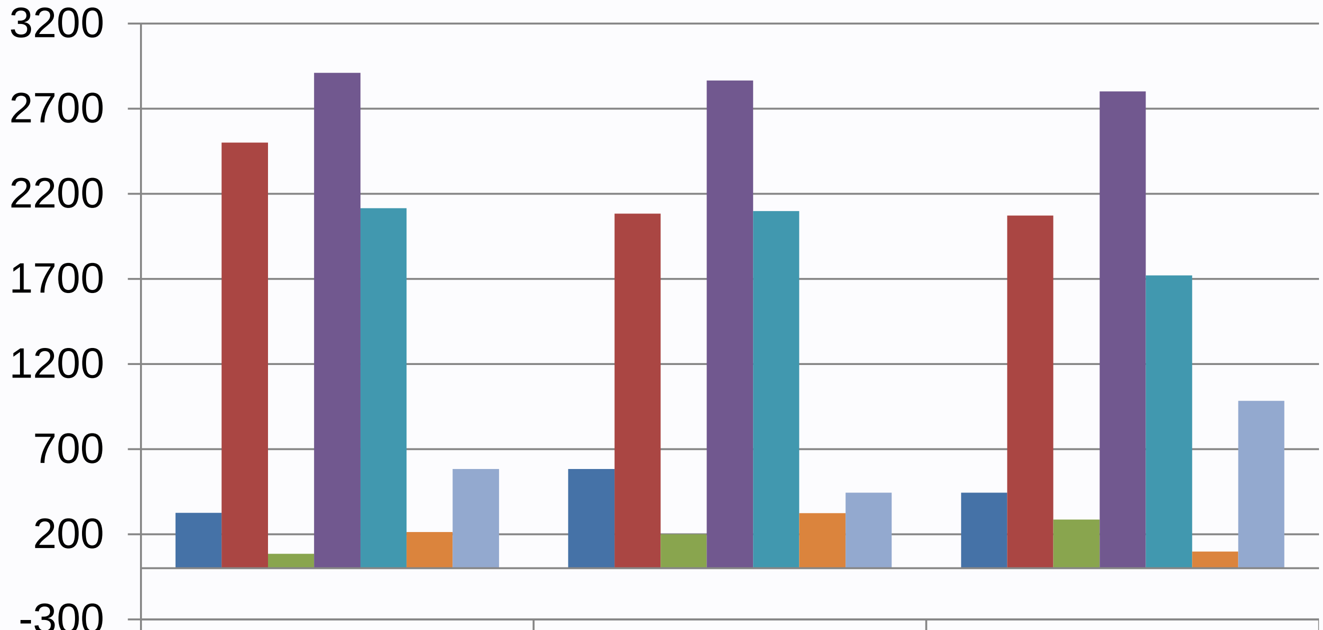
	2017	2018	2019	2020
BeginningStock	2,765	2,290	2,958	4,390
Production	12,607	12,393	12,929	13,187
Import	885	1,536	2016	
Total Supply	16,257	16,219	17,903	17,577
Domestic Use	13,967	13,261	13,512	13,729
Ending Stock	2,290	2,958	4,391	3,848

MAIZE: ESTIMATED SUPPLY AND UTILIZATION, PHILIPPINES
Calendar Year 2017-2020
(In Thousand Metric Ton)



	2017	2018	2019
Beginning Stock	382	330	410
Production	7,915	7,770	8,000
Import	650	750	750
Total Supply	8,947	8,850	9,160
Domestic Use	8,617	8,440	8,720
Ending Stock	330	410	440

SUGAR: ESTIMATED SUPPLY AND UTILIZATION, PHILIPPINES
Calendar Year 2017-2020
(In Thousand Metric Ton)



	2017	2018	2019
Beginning Stock	326	583	444
Production	2500	2083	2072
Imports	85	199	286
Total Supply	2911	2865	2802
Domestic Use	2115	2098	1720
Export	213	323	99
Ending Stock	583	444	983

TABLE 2

Paddy/Rice: Monthly Prevailing Prices Philippines, 2017-2019
(Peso per Kilogram)

		FARMGATE (Paddy)			Wholesale (MWR)			Retail (WMR)		
MONTH		2017	2018	2019	2017	2018	2019	2017	2018	2019
January		17.89	19.12	19.84	38.23	39.51	41.59	41.87	42.43	45.07
February		17.91	19.75	19.63	38.39	40.13	41.29	41.82	42.98	44.69
March		17.97	20.41	19.00	38.28	40.70	40.62	41.92	43.44	44.22
April		18.33	20.68	18.57	38.61	41.01	39.95	41.88	43.76	43.72
May		18.16	21.02	18.27	38.49	41.18	39.50	41.80	43.94	43.17
June		18.30	21.31	17.91	38.85	41.52	39.32	41.97	44.29	42.99
July		18.94	21.63		39.13	42.23		42.10	44.96	
August		18.76	22.39		39.21	43.78		42.17	46.37	
September		18.13	22.88		38.92	45.97		42.43	49.09	
October		17.53	21.10		39.05	44.79		42.07	48.50	
November		18.09	20.11		39.39	42.97		42.02	46.78	
December		18.53	20.09		39.19	42.10		42.32	45.59	
Average	₱	18.21	20.87	18.87	38.81	42.16	40.38	42.03	45.18	43.98
	US$	0.36	0.41	0.37	0.76	0.82	0.79	0.82	0.88	0.86

END OF PRESENTATION

Table : Estimated Commodities' Supply and Utilization for Year 2017-2020

Country : Philippines

Unit : 1,000 metric tons

Particulars	Rice				Maize				Soybean				Sugar			
	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020
Beginning Stock	2,765	2,290	2,958	4,390	382	330	410	no available data	0.0	no available data			326	583	444	no available data
Production																
- Paddy basis	19,276	19,066	19,890	20,288	7,915	7,770	8,000		0.66				2,500	2,083	2,072	
- Milled Basis	12,607	12,393	12,929	13,187												
Import*	885	1,536	2,016	—	650	750	750		191				85	199	286	
Total Supply	**16,257**	**16,219**	**17,902**	**13,729**	**8,947**	**8,850**	**9,160**		**192**				2,911	2,865	2,802	
Domestic Use	13,967	13,261	13,512	13,729	8,617	8,440	8720		192				2,115	2,098	1,720	
Export*	0	0	0	0	0	0	0		0.0				213	323	99	
Ending Stock	2,290	2,958	4,390	3,848	330	410	440		0.0				583	444	983	

Notes : 1. Data provided would be used for ASEAN food situation analysis

2. Please fill in the table with complete data

3. in case that the data is not available or nil,please specify

* Export/Import 2019 : January - May or June 2019 (Whichever available)

Singapore

Table : Estimated Commodities' Supply and Utilization for Year 2017-2020

Country : **Singapore**

Unit : 1,000 metric tons

Particulars	Rice				Maize				Soybean				Sugar			
	2017	2018	2019 (Estimated)	2020 (Estimated)	2017	2018	2019 (Estimated)	2020 (Estimated)	2017	2018	2019 (Estimated)	2020 (Estimated)	2017	2018	2019 (Estimated)	2020 (Estimated)
Beginning Stock	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Production	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- Paddy basis	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
- Milled Basis	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Import*	324	288	305	306	49	37	37	37	28	29	29	29	275	283	278	279
Total Supply	324	288	305	306	49	37	37	37	28	29	29	29	275	283	278	279
Domestic Use	257	248	240	248	49	37	37	37	28	29	28	28	243	258	250	251
Re-export*	67	40	65	57	0.03	0.1	0.1	0.1	0.3	0.2	0.25	0.2	31	25	28	28
Ending Stock	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Notes : 1. Data provided would be used for ASEAN food situation analysis
2. Please fill in the table with complete data
3. in case that the data is not available or nil,please specify
* Re-Export/Import 2018 : January - May or June 2019 (Whichever available)

Enterprise Singapore

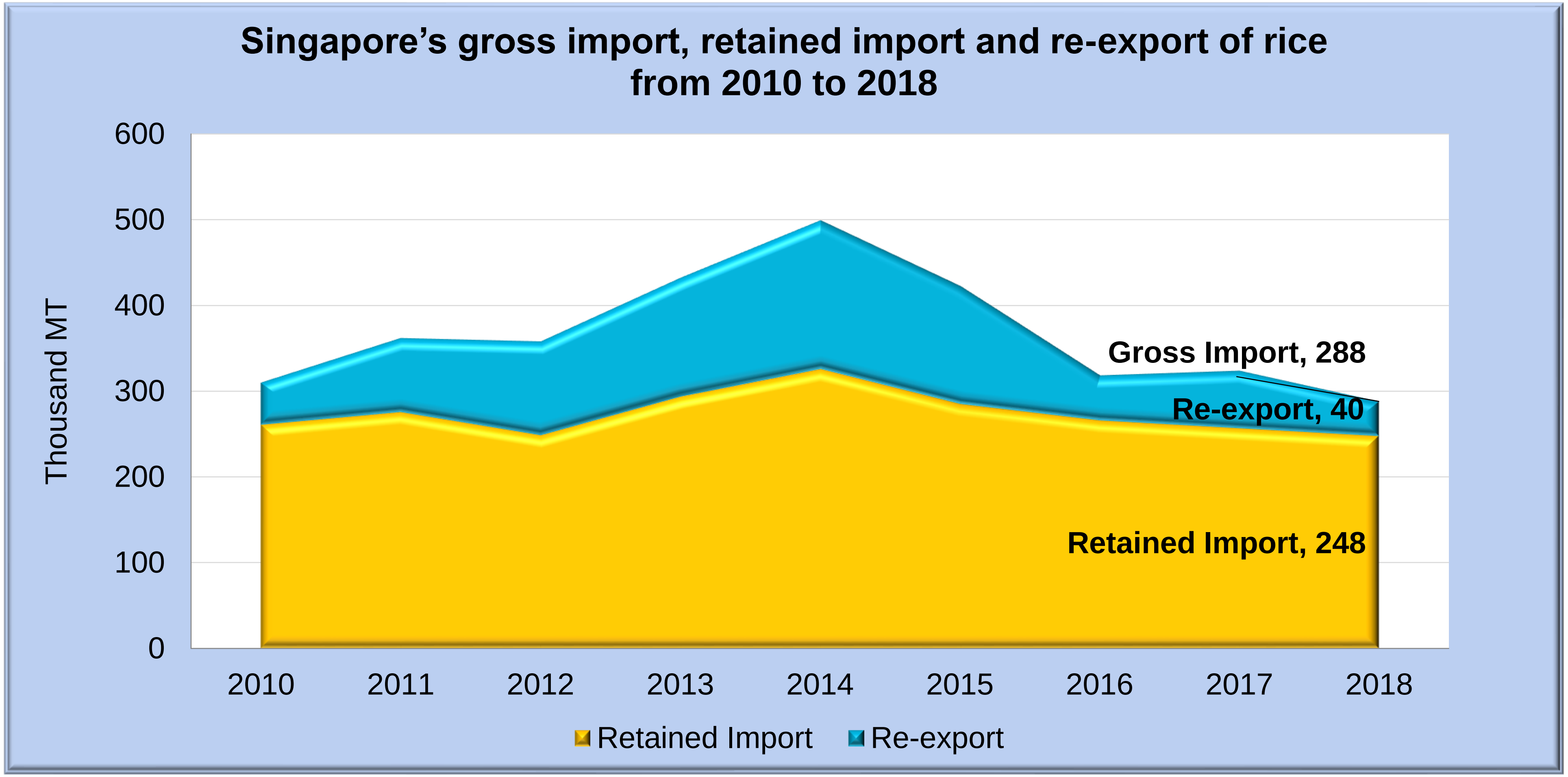
GrowingEnterprises SG

The 39th Meeting of the ASEAN Food Security Reserve Board

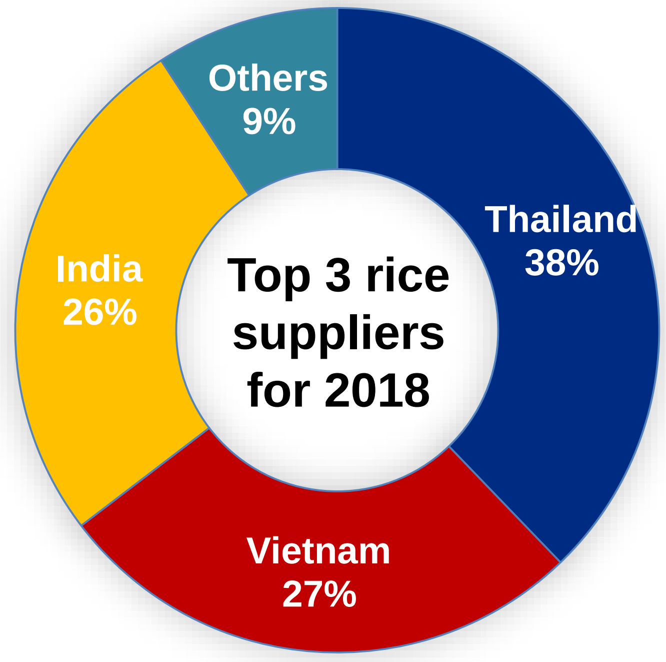
Country Report - Singapore

16 August 2019

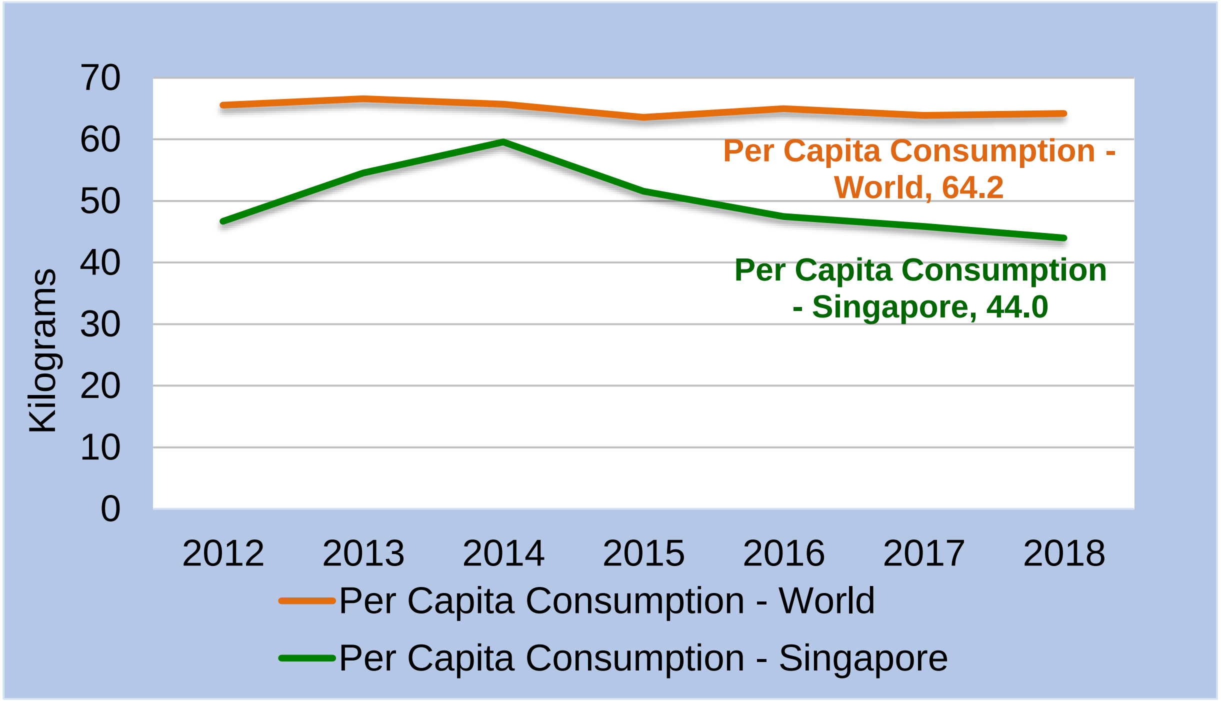
Singapore's gross import for rice reduced by 11.1% in 2018



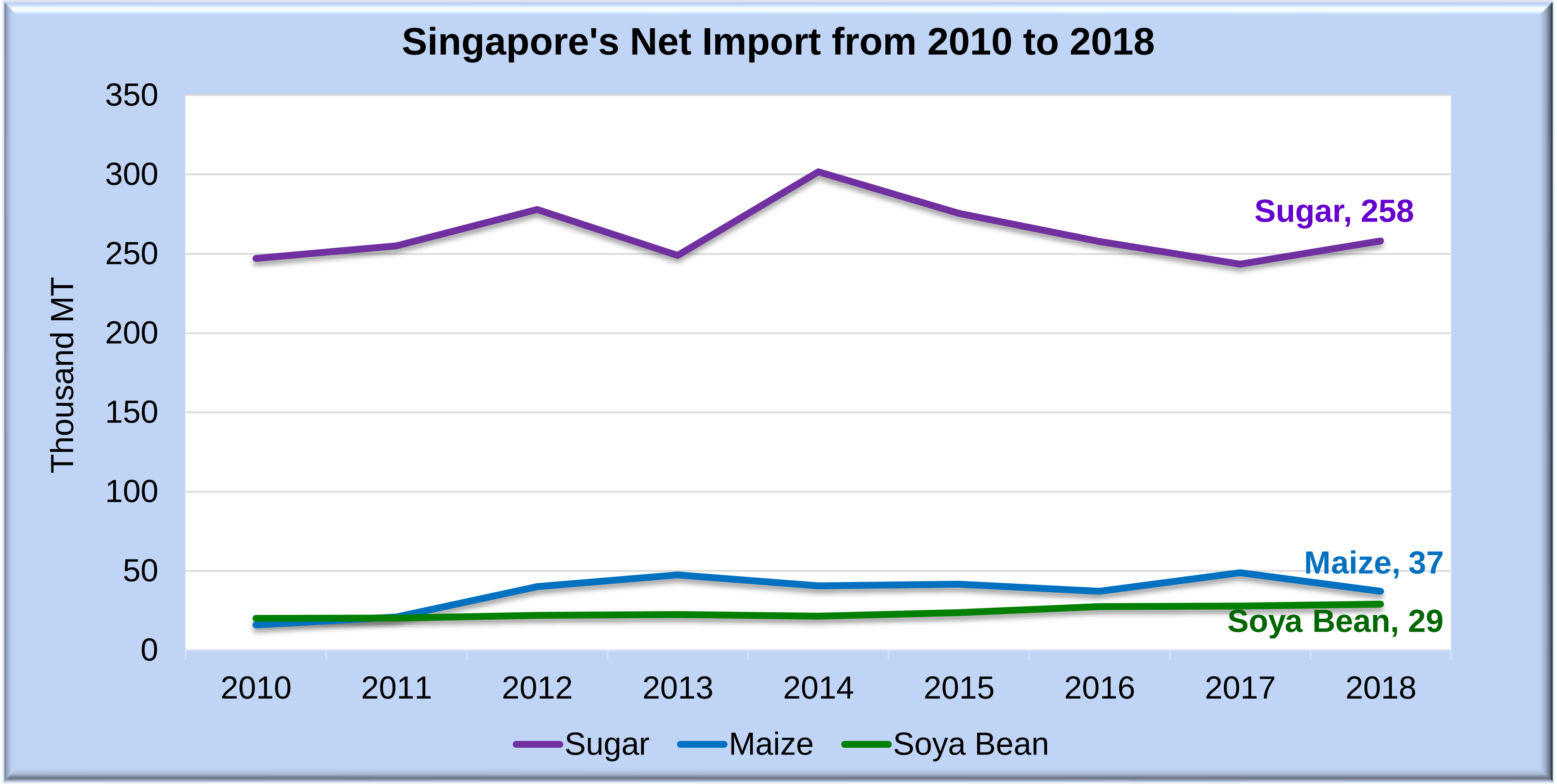
Singapore's top 3 rice suppliers remained as Thailand, Vietnam and India



Per Capita Rice Consumption for 2018



Singapore's net import for sugar, maize and soya bean remained stable in 2018



Thank You

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Thailand

COUNTRY REPORT
ON FOOD SITUATION IN THAILAND FROM 2017 - 2019

1. RICE

According to the statistics reported by the Office of Agricultural Economics (OAE), the overall rice cultivation area and rice production in Thailand have increased over the past two years (2017-2018) but are expected to be slightly declining in 2019. The total rice farmland for both in- and off-season cultivation in 2019 is predicted at 11.33 Mha, slightly down by 1.73 percent compared to that of 2018 (11.53 Mha), while the overall rice production in 2019 is predicted at 31.96 MMTs as paddy rice (or 21.09 MMTs as milled rice), down by 2.86 percent from that of 2018 (32.90 MMTs as paddy rice or 21.71 MMTs as milled rice). Likewise, the overall yield of rice in 2019 is forecasted to decline to 2.82 MTs/ha due to lower rice planting areas, which is slightly down by 1.40 percent from previous year (2.86 MTs/ha).

The demand of rice for domestic consumption and utilization in Thailand is averaged at approximately 10 MTs/year with a slight increase every year. In 2019, the demand of rice is estimated to reach 11.54 MMTs, whereas 10.33 MMTs and 10.11 MMTs were reported in 2018 and 2017, respectively.

Since Thailand is capable of producing more than plenty amount of rice for domestic consumption and utilization, the rice surplus is, therefore, generally being exported to countries having the demand for it. Each year Thailand exports good quality rice of different kinds amounting to about 10 MMTs to all regions around the globe with the African continent being the number one importing region followed by Asia and the Middle East. According to the rice export statistics over the past 3 years (2016-2018) reported by the Thai Customs, the export volume of Thai rice has been in fluctuate trend being 9.91 MMTs, 11.67 MMTs and 11.09 MMTs, respectively which generated an average value of 5.07 billion USD for the country each year. For 2019 starting from January to May, Thailand exported 3.78 MMTs of rice, down about 15% from 4.44 MMTs in 2018. In value terms, Thailand’s rice earned 1.98 billion USD in first five months of 2019, down about 12% from 2.26 billion USD of the same period in 2018.

2. MAIZE

The cultivation area for maize in Thailand has continuously inclined over last two years as the Government has supported farmers to grow more maize after rice season in order to ease the shortage of maize for animal feed production. In 2019, the maize-cultivated area is expected to reach 1.10 Mha, slightly increase by 2.68 percent compared to that figure of 2018 being at 1.07 Mha. As the result, the total maize production in 2019, is expected to increase by 1.00 percent from 5.04 MMTs in 2018 to 5.09 MMTs in 2019 and a higher yield of 4.68 MTs/ha is also anticipated while a figure of 4.59 MTs/ha was reported in 2018.

Statistically, since 2017 the demand of maize for domestic utilization and consumption in Thailand has always been over the production and is averaged at about 8 MMTs/year. As a consequence, each year Thailand somewhat relies on the import of maize mainly from Myanmar, Lao PDR and Cambodia, and on the use of other carbohydrate-rich substitutes such as legumes, wheat and broken rice that are preferably used in animal feeds. The demand of maize in 2019 is forecasted at 8.44 MMTs up by 2.43 percent from that in 2018 which was reported to be 8.24 MMTs.

3. SOYBEAN

Soybean cultivation area in Thailand has declined over recent years due to more lands have been converted into plantation of other more-suitable and profitable crops such as rice and maize. In 2019 the cultivation area for soybean is forecasted to be 0.024 Mha, which remains steady as that in 2018. Regarding to total production of soybean, it is expected to remain unchanged at 0.04 MMTs. The yield of 2019 is expected to slightly increase by 1.68 percent from 1.79 MTs/ha in 2018 to 1.82 MTs/ha.

The demand of soybean for domestic utilization and consumption in Thailand during 2017-2018 was averaged at approximately 2.77 MMTs/year, while the demand in 2019 is forecasted to be 2.84 MMTs, slightly increase by 2.90 percent from that in 2018 (2.76 MMTs). Obviously, the demand and the domestic production of soybean in Thailand have always been in imbalance—the demand overly exceeds the domestic supply. As a consequence, each year Thailand heavily relies on the import of soybean from other countries such as USA, Brazil, and Canada with an average importing quantity of 2.74 MMTs/year to meet the demand for domestic use. In 2019 (Jan.-May.), the volume of

soybean already imported to Thailand is reported to be 1.51 MMTs.

In addition, in attempts to lessen the dependency on the import of soybean by increasing the domestic production, the government of Thailand by the Office of Agricultural Economics (OAE) under the Ministry of Agriculture and Cooperatives is currently conducting a campaign to encourage farmers to grow more soybean domestically by planting soybean in the rice-cultivated land after rice harvesting is completed.

4. SUGARCANE (SUGAR)

The cultivated area for sugarcane in 2019 is predicted to be 1.84 Mha, or increase by 2.79 percent compared to the figure in 2018 (1.79 Mha). The production of sugarcane in 2019 is also forecasted to be 131.00 MMTs, down from 135.07 MMTs in 2018 or decrease by 3.01 percent. Regarding the yield of sugarcane production in 2019 is anticipated to be 65.06 MTs/ha, down by 16.59 percent from previous year, which was 73.00 MTs/ha.

As for sugar production, on average, Thailand can produce about 10 - 14 MMTs of sugar yearly. In 2019, the sugar production is estimated to reach 14.02 MMTs with a decrease of 2.98 percent compared to the production in 2018 (14.45 MMTs).

Demand of sugar for domestic consumption during 2017-2018 was averaged at around 2.77 MMTs/year, and the demand in 2019 has been forecasted to be 2.60 MMTs, up by 3.59 percent from 2018 (2.51 MMTs). As for the export of sugar, each year Thailand exports excessive amount of sugar to countries in need with an average of about 6.85 MMTs/year having the main sugar-importing countries be Indonesia, South Korea, Malaysia, Cambodia and Taiwan. In 2019 (Jan.-May.), the export volume of sugar from Thailand is reported to be 3.28 MMTs with the export value of about 1 billion USD.

Rice Trade Administration Division

Department of Foreign Trade

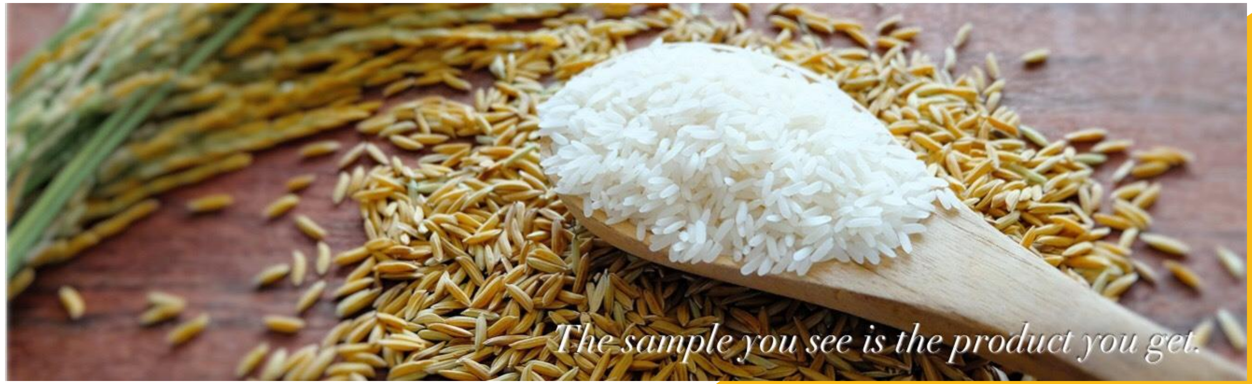
July 2019

The 39th AFSRB Meeting
Bangkok, Thailand

Report on Food Situation in Thailand

Presented by Department of Foreign Trade,
Ministry of Commerce, Thailand

The 39th Meeting Of the ASEAN Food Security Reserve Board



Thailand
Rice

2018

Overall (In-/Off-Seasons)
Cultivated Area = 11.53 Mha
Total Production:
- As Paddy = 32.90 MMTs
- Milled rice = 21.71 MMTs

Average Yield = 2.86 MTs/ha

2019

Overall (In-/Off-Seasons)
Cultivated Area = 11.33 Mha (Δ -1.73%)
Total Production:
- As Paddy = 31.96 MMTs
- Milled rice = 21.09 MMTs (Δ -2.86%)

Average Yield = 2.82 MTs/ha

39th AFSRB Thailand

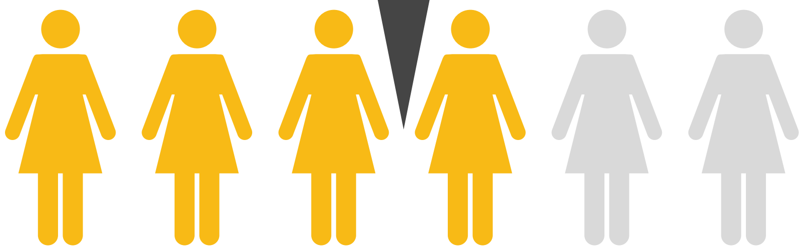
Rice

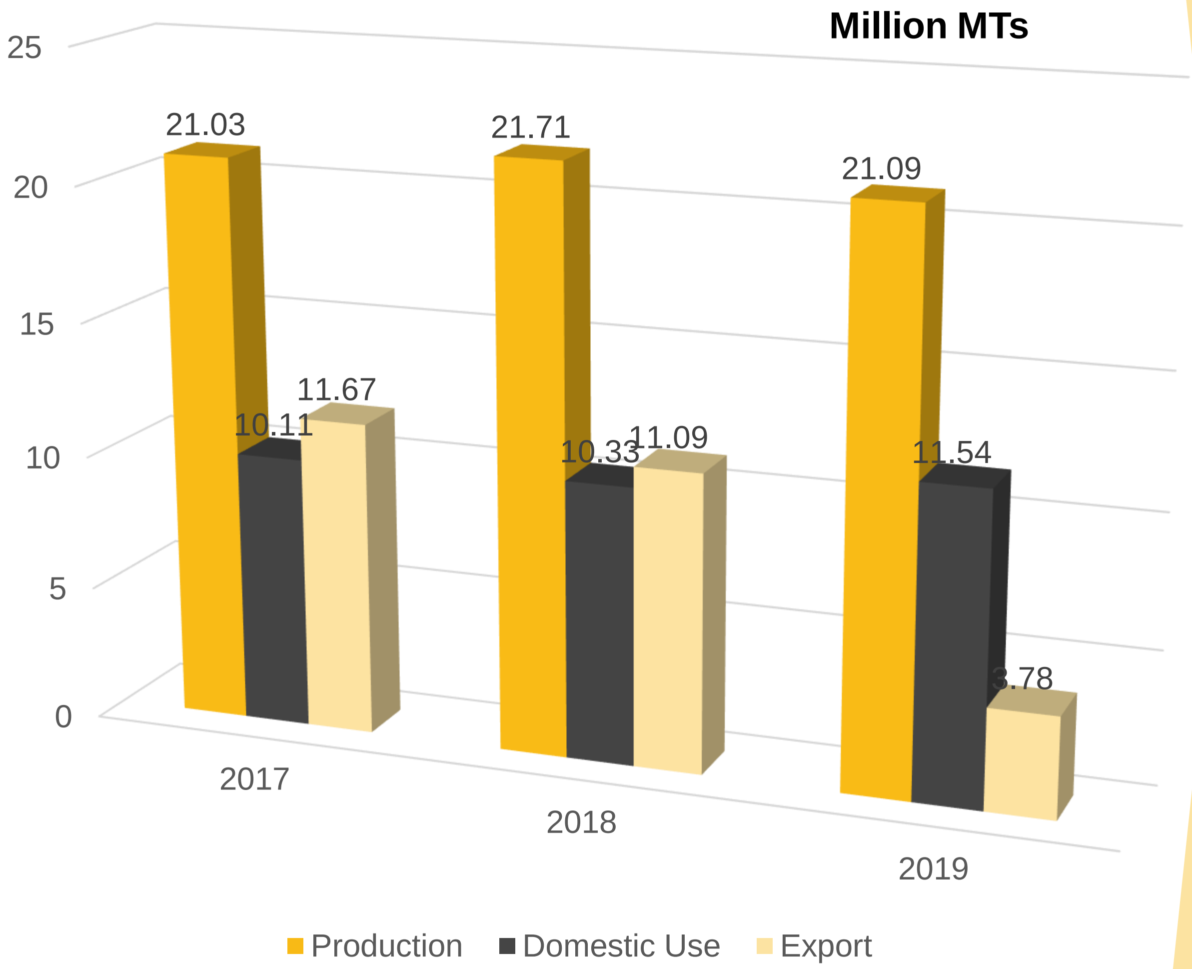
- Total rice production in 2019 is forecasted to increase to 31.96 MMTs as paddy and 21.09 MMTs as milled rice
- Domestic consumption of rice in Thailand is averaged ~10 MMTs/year and in 2019 is forecasted at 11.54 MMTs
- Averaged export volume of Thai rice ~10 MMTs/year worldwide: Africa ▶ Asia ▶ Middle East

Export volume in 2018 was reported at 11.09 MMTs

In 2019 (Jan-May) 3.78 MMTs of rice, value = 1.98 billion USD has already been exported

- By the end of 2019, ~9.5 MMTs of rice are anticipated to be exported





Thailand
Maize

2018

Cultivated Area = 1.07 Mha

Total Production = 5.04 MMTs

Average Yield = 4.59 MTs/ha

39th AFSRB Thailand

2019

Cultivated Area = 1.10 Mha (∆ +2.68%)

Total Production = 5.09 MMTs (∆ +1.00%)

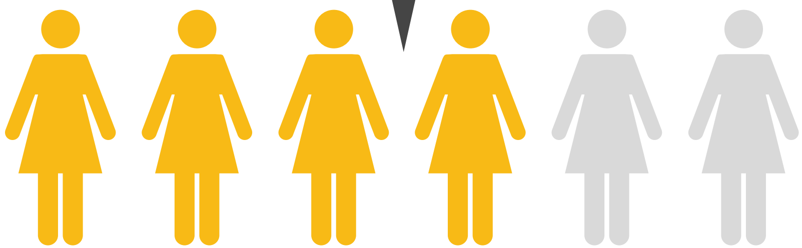
Average Yield = 4.68 MTs/ha

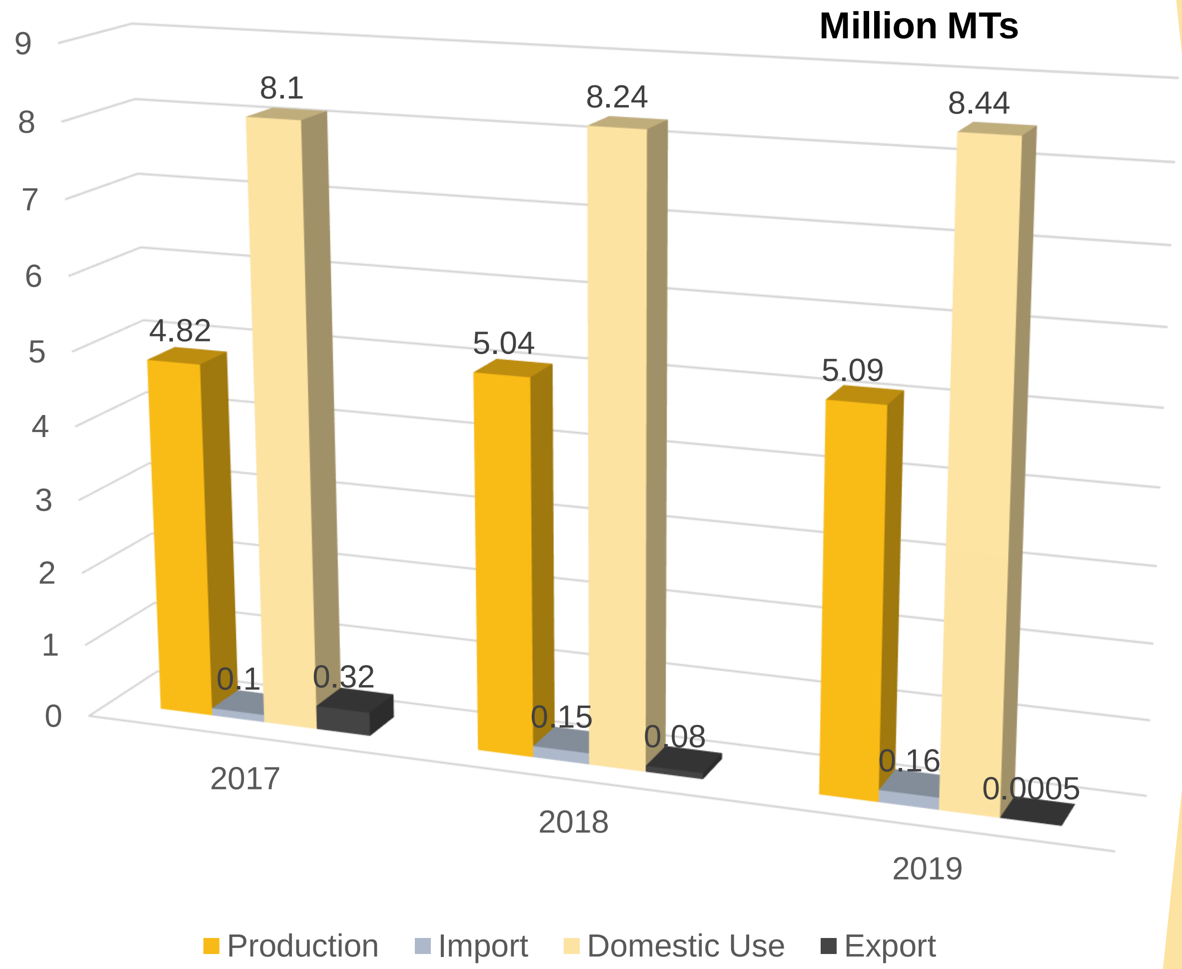
Maize

- Total production in 2019 is expected to slightly increase to 5.09 MMTs

- Domestic utilization of maize in 2019 is forecasted at 8.44 MMTs increasing from that 2018 (8.24 MMTs)

- As Demand ▶ Supply , Thailand relies on the import of maize mainly from Myanmar, Lao PDR and Cambodia, and the use of other carbohydrate-rich substitutes such as legumes, wheat and broken rice for animal feeds





Thailand Soybean

2018

Cultivated Area = 0.024 Mha

Total Production = 0.04 MMTs

Average Yield = 1.79 MTs/ha

2019

Cultivated Area = 0.024 Mha

Total Production = 0.04 MMTs

Average Yield = 1.82 MTs/ha

39th AFSRB Thailand

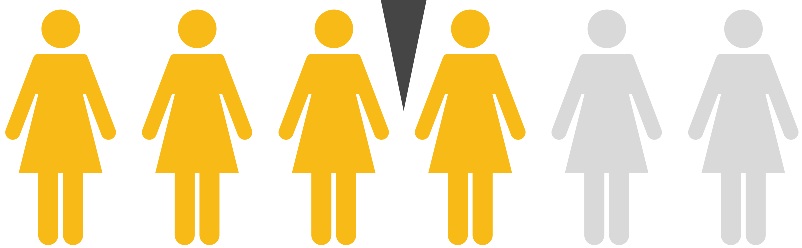
Soybean

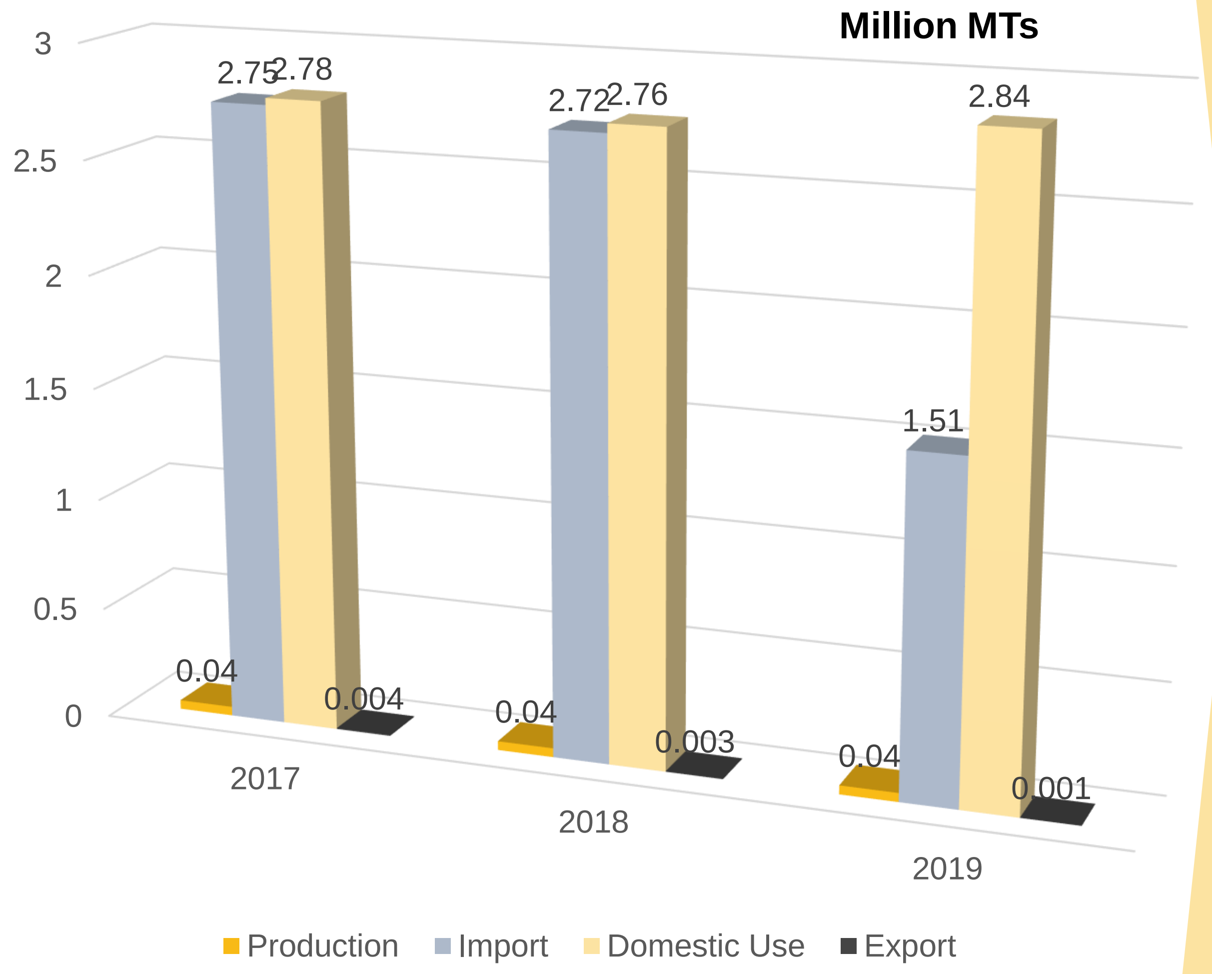
- Total production in 2019 is expected at 0.04 MMT, remaining steady as 2018
- Average demand for domestic use ~2.77 MMTs/year
    - In 2019 is forecasted to reach 2.84 MMTs, slightly increase 2.90% from 2018

Always Demand ▶ Supply, Thailand heavily relies on the import of soybean from USA, Brazil, and Canada

    - In 2019 (Jan-May), the volume of imported soybean = 1.51 MMTs

- To increase domestic production, the Government encourages farmers by planting soybean in rice-cultivated land after rice harvesting is completed.





Thailand
Sugarcane

2018

Cultivated Area = 1.79 Mha

Total Production = 135.07 MMTs

Average Yield = 73.00 MTs/ha

39th AFSRB Thailand

2019

Cultivated Area = 1.84 Mha (Δ+2.79%)

Total Production = 131.00 MMTs (Δ -3.01%)

Average Yield = 65.06 MTs/ha

Sugarcane

- On average, Thailand can produce ~10-14 MMTs of sugar/year

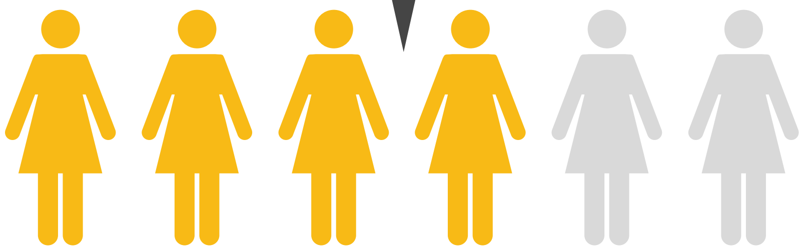
• Total sugar production in 2019 is estimated to reach 14.02 MMTs

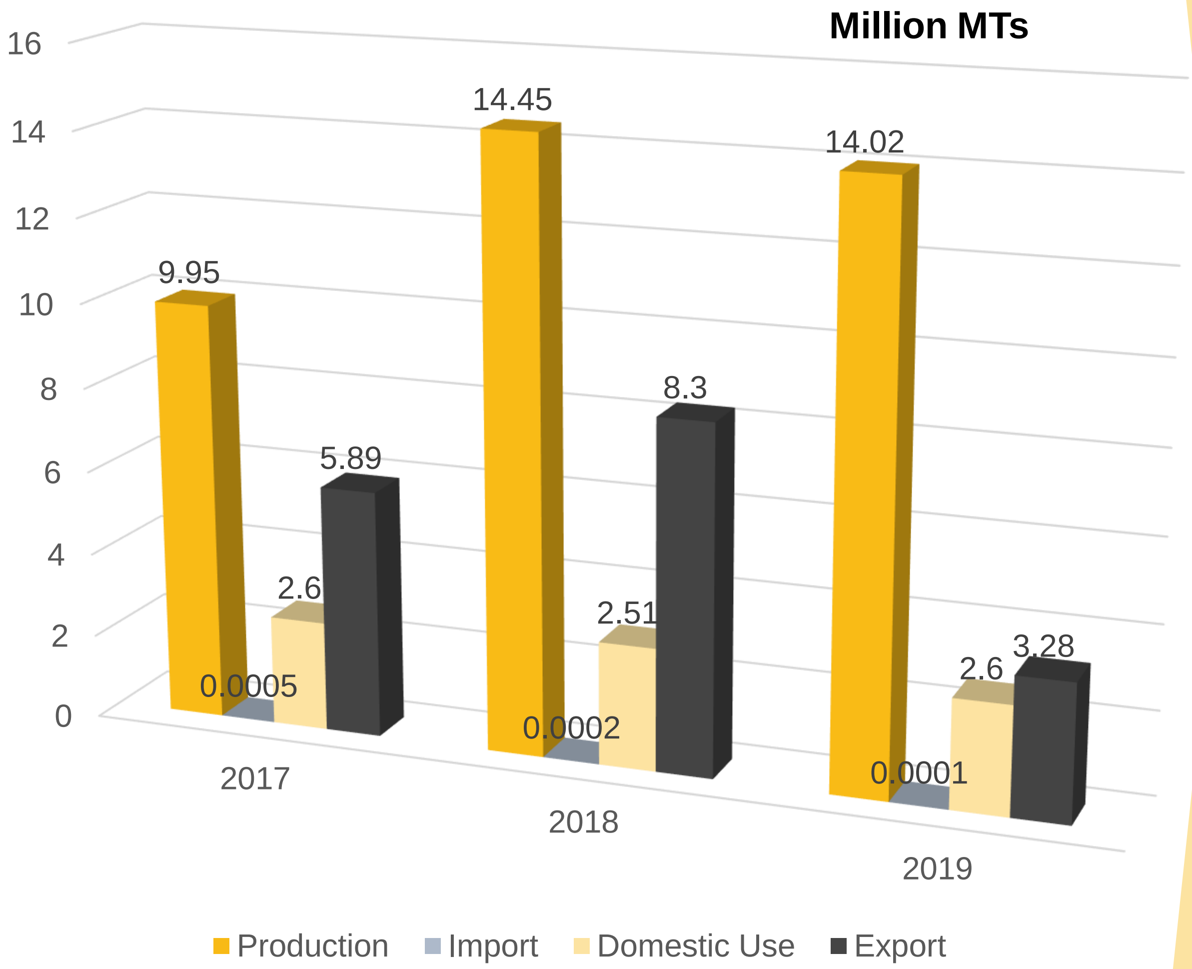
- Average demand for domestic use of sugar = 2.77 MMTs/year

• In 2019 is expected to be 2.60 MMTs, up by 3.59% from 2018

- Thailand exports sugar at an average of 6.85 MMTs/year to countries such as Indonesia, South Korea, Malaysia, Cambodia and Taiwan.

• Export volume of 2019 (Jan-May) is reported to be 3.28 MMTs ▶ value of ~1 billion USD





Thank you

Vietnam

REPORT

PRODUCTION AND TRADE OF RICE AND OTHER THREE COMMODITIES IN VIETNAM 2017 - 2020

Agriculture sector still plays an important role in the socio-economics of the country with strong supports from the Government. Viet Nam remains one of the highest exporter of rice and the leading export of other agro products. The production status of paddy rice, maize, soybean and sugar states as follows:

1. RICE

The total rice supply increased from 32.21 million MT in 2017 to 32.67 million MT in 2018.

Among the total rice supply in 2018, 22.60 million MT used for domestic consumption and 6.00 million MT reserved for export. The beginning stock decreased from 4.41 million MT in 2017 to 3.88 million MT in 2018. The ending stock went up from to 3.88 million MT in 2017 to 3.97 million MT in 2018.

2. MAIZE

The output of maize in 2018 is decreased to its in 2017 (4,906 compare to 5,110 million MT). Due to the high demand of domestic consumption maize for animal feed, Viet Nam has to import maize. In 2018, total supply is 14.303 million MT, of which imported volume is 8.00 million MT, higher than that of 2017. The highest imported volume is estimated in 2020: 8.50 million MT.

3. SOYBEAN

Soybean production is decreased from 102 thousand tons in 2017 to 81 thousand tons in 2018. Total supply in 2018 reached 1,885 million MT of which imported volume was about 1.65 million tons. Soybean mainly has used as processing animal feed.

4. SUGAR

In 2018, quantity of sugar is higher than that of in the 3 previous years and 2 next years. Total surplus of each in 4 years are almost the same. Estimated 1,67 million MT.

Table: Estimated of Commodities' Supply and Utilization from 2015-2018 in Vietnam

Unit: 1,000 tons

Particulars	Rice				Maize			
	2015	2016	2017	2018	2015	2016	2017	2018
Beginning Stock	**2,000**	**3,240**	**4,417**	**3,923**	**604**	**441**	**1,810**	**1,420**
Production (Paddy)	45,091	43,165	42,763	44,538	5,287	5,247	5,132	4,950
Milled	29,310	28,057	27,796	28,950				
Import	-				7,550	8,300	7,800	8,000
Total Supply	**31,310**	**31,297**	**32,213**	**32,873**	**13,441**	**13,988**	**14,742**	**14,370**
Domestic use	21,500	22,000	22,500	22,800	13,000	12,178	13,322	13,500
Export	6,570	4,880	5,790	6,000	-	-	-	
End Stock (milled)	**3,240**	**4,417**	**3,923**	**4,073**	**441**	**1,810**	**1,420**	**870**

Particulars	Soybean				Sugar			
	2015	2016	2017	2018	2015	2016	2017	2018
Beginning Stock	**100**	**106**	**127**	**196**	**457**	**458**	**330**	**159**
Production (Paddy)	146	161	144	144	18,337	17,221	18,319	19,890
Milled					1,418	1,237	1,239	1,420
Import	1,460	1,560	1,645	1,650	81	85	90	94
Total Supply	**1,706**	**1,827**	**1,916**	**1,990**	**1,956**	**1,780**	**1,659**	**1,673**
Domestic use	1,600	1,700	1,720	1,800	1,400	1,450	1,500	1,520
Export	-	-	-					
End Stock (milled)	**106**	**127**	**196**	**190**	**556**	**330**	**159**	**153**

Source: General Statistics Office, Ministry of Agriculture and Rural Development

Table : Estimated Commodities' Supply and Utilization for Year 2017-2020

Country : Vietnam

Unit : 1,000 metric tons

Particulars	Rice				Maize				Soybean				Sugar			
	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020	2017	2018	2019	2020
Beginning Stock	4,417	3,883	3,973	3,504	1,810	1,398	803	463	127	154	85	60	350	179	173	143
Production	42,739	43,979	44,356	44,000	5,110	4,906	4,760	4,704	102	81	75	76	18,356	17,837	16,375	16,170
- Paddy basis																
- Milled Basis	27,796	28,790	28,831	28,600									1,239	1,420	1,400	1,400
Import*					7,800	8,000	8,300	8,500	1,645	1,650	1,750	1,850	90.00	94.00	100.00	100
Total Supply	32,213	32,673	32,804	32,104	14,720	14,303	13,863	13,667	1,874	1,885	1,910	1,986	1,679	1,693	1,673	1,643
Domestic Use	22,500	22,600	22,800	23,000	13,322	13,500	13,400	13,450	1,720	1,800	1,850	1,860	1,500	1,520	1,530	1,550
Export*	5,830	6,100	6,500	6,300												
Ending Stock	3,883	3,973	3,504	2,804	1,398	803	463	217	154	85	60	126	179	173	143	93

Notes : 1. Data provided would be used for ASEAN food situation analysis
2. Please fill in the table with complete data
3. in case that the data is not available or nil,please specify
* Export/Import 2019 : January - May or June 2019 (Whichever available)

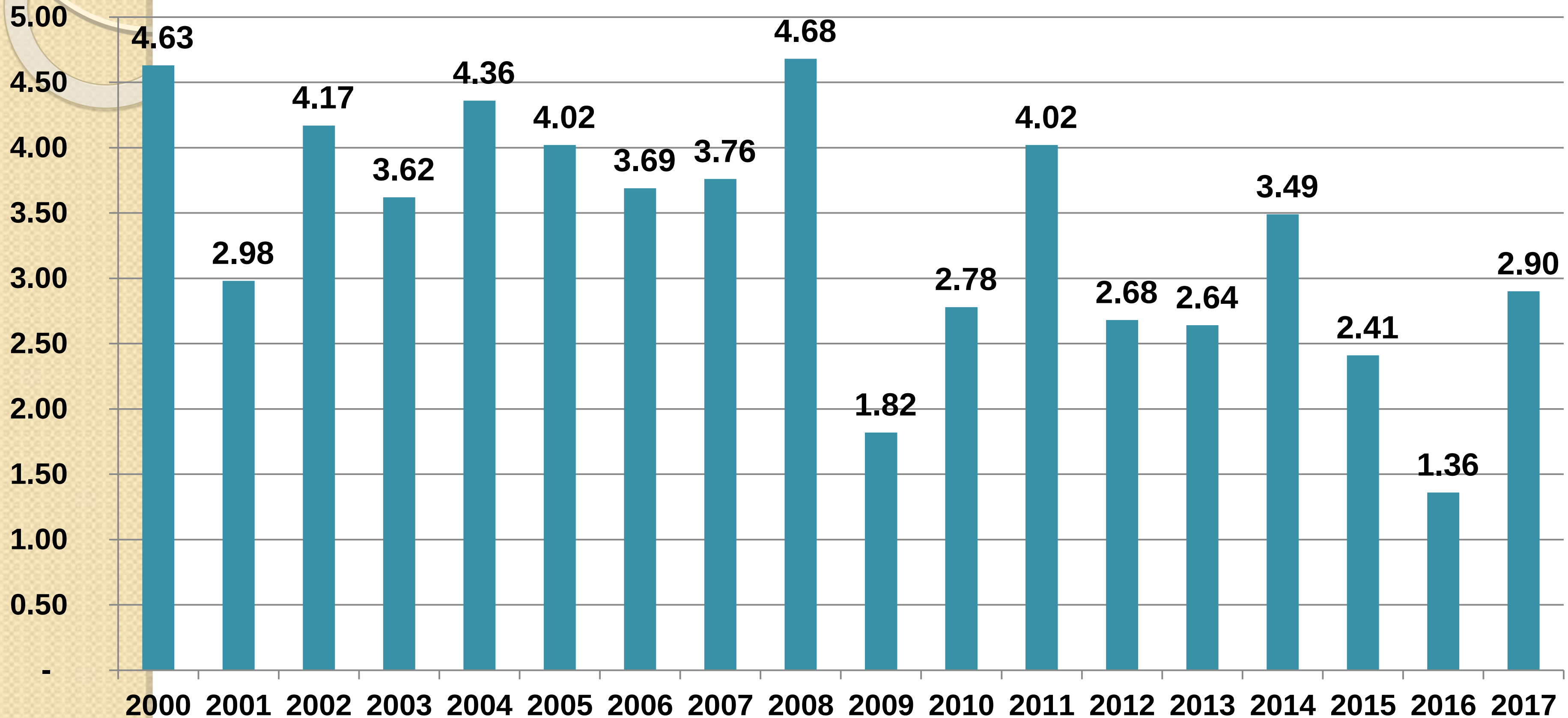
MINISTRY OF AGRICULTURE AND RURAL DEVELOPMENT

OF VIETNAM

FOOD SITUATION

RICE, MAIZE, SOYBEAN AND SUGAR

Chart 1: GDP growth of Agriculture sector (%) From 2000 to 2019



2018	**3,76 %**
2019	2,70 – 2,80 %

1. Rice

- **Rice Production**

The total rice supply increased from 32.21 million MT in 2017 to 32.67 million MT in 2018.

Among the total rice supply in 2018, 22.60 million MT used for domestic consumption and 6.00 million MT reserved for export. The beginning stock decreased from 4.41 million MT in 2017 to 3.88 million MT in 2018. The ending stock went up from to 3.88 million MT in 2017 to 3.97 million MT in 2018.

2. Maize

The output of maize in 2018 is decreased to its in 2017 (4,906 compare to 5,110 million MT). Due to the high demand of domestic consumption maize for animal feed, Viet Nam has to import maize. In 2018, total supply is 14.303 million MT, of which imported volume is 8.00 million MT, higher than that of 2017. The highest imported volume is estimated in 2020: 8.50 million MT.

3. Soybean

Soybean production is decreased from 102 thousand tons in 2017 to 81 thousand tons in 2018. Total supply in 2018 reached 1,885 million MT of which imported volume was about 1.65 million tons. Soybean mainly has used as processing animal feed.

4. Sugar

In 2018, quantity of sugar is higher than that of in the 3 previous years and 2 next years. Total surplus of each in 4 years are almost the same. Estimated 1,67 million MT.

Table 1: Estimated of Commodities' Supply and Utilization from 2015-2018 in Vietnam (Rice)

(Unit: 1,000 tons)

Particulars	Rice			
	2017	2018	2019	2020
Beginning Stock	**4,417**	**3,883**	**3,973**	**3,504**
Production (Paddy)	42,739	43,979	44,356	44,000
Milled	27,796	28,790	28,831	28,600
Import	-			
Total Supply	**32,213**	**32,673**	**32,804**	**32,104**
Domestic use	22,500	22,600	22,800	23,000
Export	5,830	6,100	6,500	6,300
End Stock (milled)	**3,883**	**3,973**	**3,504**	**2,804**

Table 1: Estimated of Commodities' Supply and Utilization from 2015-2018 in Vietnam (Maize)

(Unit: 1,000 tons)

Particulars	Maize			
	2017	2018	2019	2020
Beginning Stock	**1,810**	**1,398**	**803**	**463**
Production (Paddy)	5,110	4,906	4,760	4,704
Milled				
Import	7,800	8,000	8,300	8,500
Total Supply	**14,720**	**14,303**	**13,863**	**13,667**
Domestic use	13,322	13,500	13,400	13,450
Export	-	-	-	
End Stock (milled)	**1,398**	**803**	**463**	**217**

Table 1: Estimated of Commodities' Supply and Utilization from 2015-2018 in Vietnam (Soybean)

(Unit: 1,000 tons)

Particulars	Soybean			
	2017	2018	2019	2020
Beginning Stock	**127**	**154**	**85**	**60**
Production (Paddy)	102	81	75	76
Milled				
Import	1,645	1,650	1,750	1,850
Total Supply	**1,874**	**1,885**	**1,910**	**1,986**
Domestic use	1,720	1,800	1,850	1,860
Export				
End Stock (milled)	**154**	**85**	**60**	**126**

Table 1: Estimated of Commodities' Supply and Utilization from 2015-2018 in Vietnam (Sugar)

(Unit: 1,000 tons)

Particulars	Sugar			
	2017	2018	2019	2020
Beginning Stock	**350**	**179**	**173**	**143**
Production (Paddy)	18,356	17,837	16,375	16,170
Milled	1,239	1,420	1,400	1,400
Import	90.00	94.00	100.00	100
Total Supply	**1,679**	**1,693**	**1,673**	**1,643**
Domestic use	1,500	1,520	1,530	1,550
Export				
End Stock (milled)	**179**	**173**	**143**	**93**

THANK YOU

FOR YOUR ATTENTION

**MINISTRY OF AGRICULTURE
AND RURAL DEVELOPMENT
OF VIETNAM**