



ASEAN Early Warning Information CROP SITUATION

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Crop Situation in Brunei Darussalam 2022



The weather in Brunei Darussalam in 2022 is favorable for cultivating crops. With sufficient rainfall, sufficient sunlight for the plants, and good water management and irrigation system in the country, these allow farmers to grow crops for the whole year. The average temperature is 38 degrees Celsius. For the heavy rainfall Northeast Monsoon in early December 2021, it is expected to persist until around end of March 2022. The first two months of Northeast Monsoon (December 2021 and January 2022), also known as the rainy season, are the months that normally receive the highest amount of rainfall and have recorded the highest number of rain days, in comparison to the other months. During this period, the country normally experiences unsettled weather conditions with occasional heavy showers or thundershowers, especially during the night until early morning. An average rainfall in December 2021 was 358.9 mm, and an average rainfall in January 2022 was 320.6 mm. The average number of rain days for December and January are 22 days and 18 days, respectively. Whereas, during the second half of Northeast Monsoon (February and March 2022), the atmospheric conditions tend to be more stable with less rainfall activities, with average rainfall for February of 162.9 mm and 143.4 mm for March. However, the overall weather condition in 2022 is still suitable for growing crops. The spread of **COVID-19** has affected to borders movement restrictions causes labor shortage mainly in vegetable farms, and increasing of some agricultural commodities' prices, especially maize and cassava, because of the higher demand for these products. The situation of main crops can be described as follow.

Rice production is predicted to increase due to increase in planted area and yield. Rice planted area is expected to increase as the weather is suitable for crop cultivation and there is good water management and irrigation system. Although, some planted areas (approximately 100 hectares) were damaged by natural disasters, which were heavy rainfall, strong winds, and stem borer attacks, the total production of the country is not affected. Likewise, rice yield is expected to increase because farmers have improved rice management, use good rice varieties called "Sembada 188" instead of other kind of rice, use more fertilizer, and take good care of crops. The harvesting period of rice in 2022 is around from February 2022 to April 2022 in the wet season, and from July to September 2022 in the dry season.

For **sugarcane**, the production is forecast to increase from the previous year because the weather is suitable for planting crops and farmers also take good care of crops, and use more fertilize resulting in the increase in yield.

For **cassava**, the planted area and production are forecast to increase from the previous year because the weather is suitable for planting crops and cassava is very popular and high demand in the country, since cassava is used for other food processing. Furthermore, farmers prefer to plant this crop because it is very convenient and use less workers compared to other crops, and farmers can obtain high net returns from higher yield. In addition, farmers also take good care of crops, use good variety, and use more fertilize resulting in the increase in yield.

For **maize**, the planted area is forecast to increase from the previous year because the weather is suitable for planting crops and farmers respond to price increase which encourages maize farmers to expand planted areas and vegetable farmers to switch to planting corns since corn requires less maintenance and less workforce. Farmers also take good care of crops, use good variety, and use more fertilize resulting in the increase in yield.



Figure 1: Monthly quantity of rice import in 2021-2022

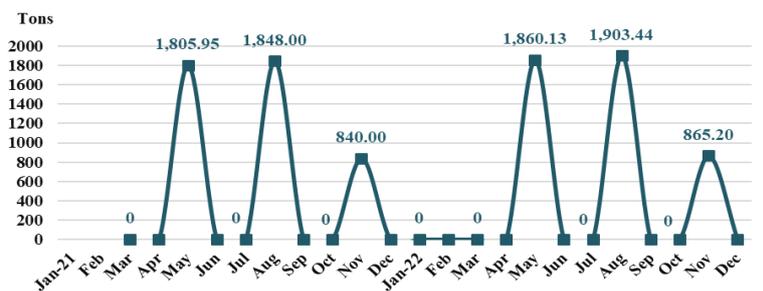


Figure 2: Monthly quantity of sugar import in 2021-2022

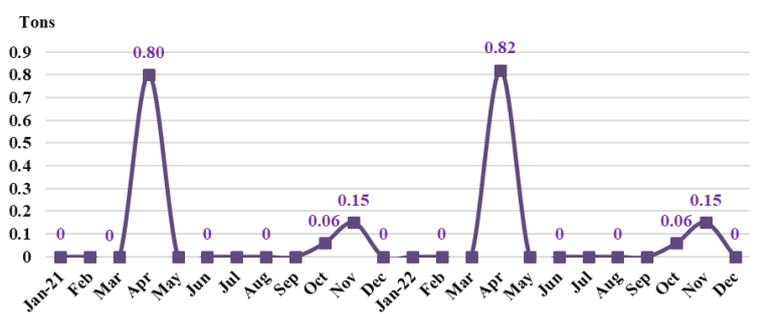
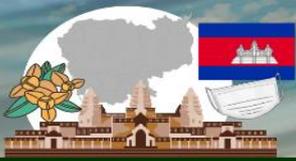


Figure 3: Monthly quantity of cassava import in 2021-2022





Crop Situation in Cambodia 2022



The overall weather in Cambodia in 2021 (2020/2021) has medium to heavy rainfall with rain amount ranges from 50 to 100 millimeters per day. There is a sufficient amount of sunlight and an irrigation system to contain water during dry season. The average temperature is at 25 to 38 degrees Celsius. Cambodia's natural disasters are flood, drought, diseases, and pests in some areas. Although most of the agricultural areas are irrigated, some of the planted areas are still facing drought as there is no thorough or lack of irrigation system. Those areas with drought are Banteay Mean Chey, Battambang, Pursat, Kampong Thom, Siem Reap, Kampong Cham, Takeo, Kampong Speu, while those areas with flood are Banteay Mean Chey, Battambang, Pursat, Kampong Thom, Siem Reap, Kampong Cham, Takeo, Kampong Speu, Prey Veng. With regard to the spread of **COVID-19**, it continues to affect Cambodia as follows 1) the cost of production gets higher due to a lack of inputs supply in a market which causes an increase in the price of agricultural products, and 2) the shortage of agricultural labors causes agricultural activities to be slower.

For **sugarcane**, the planted area is estimated to increase from last year due to the rising sugarcane price and the favorable weather for cultivating crops. While, the sugarcane production is expected to slightly increase because farmers take good care of their crops. The harvesting period of sugarcane in 2022 is from November 2022 to December 2022 or January 2023.

For Cambodia rice exported in 2021 was decreased by 34 percent compared to the volume exported in 2020. The major challenges of these decreasing were lacking of containers and increasing of freight cost, it affected the orders of premium fragrant rice mainly to EU markets and the dropped selling price (FOB). For Cambodia Cassava exported in 2021 was increased by 6 percent compared to the volume exported in 2020. The cassava slice which was mainly exported to Thailand, Vietnam and China was increased by 12.37 percent compared to 2020. The situation of five main crops can be described as follow.

The planted area of **soybean** is predicted to decline from last year due to falling soybean price and raising competing crops' prices. Likewise, soybean production is expected to decline due to unfavorable weather. The harvesting period of soybean in 2022 is during September to October 2022.

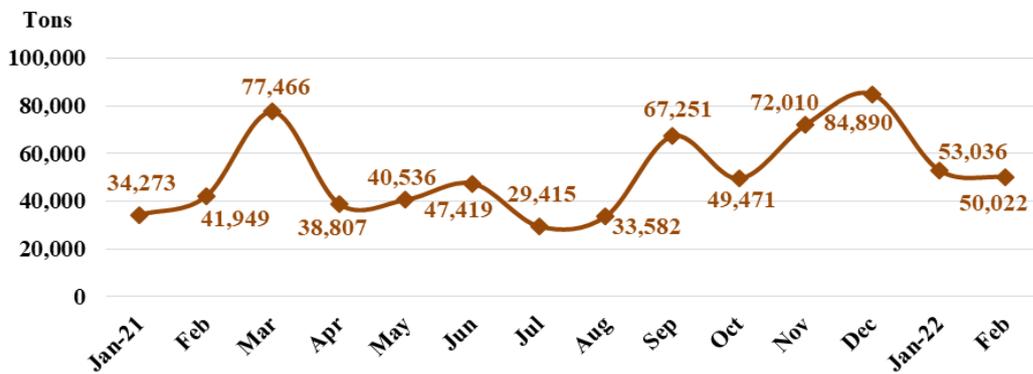


Figure 1: Monthly quantity of rice export in 2021-2022

For **cassava**, the planted area and production are expected to increase from the previous year as the price of cassava goes up. Additionally, the government supports to grow cassava by using good variety. Even through natural disaster occurred from climate change (flood, droughts), it does not affect the total production in the country. The harvesting period is from November 2022 to January 2023.

The planted area and yield of **rice** in this year are expected to rise from last year due to favorable weather together with government policy. Farmers also use good varieties and take good care of their crops from planting period to harvesting period. Although some areas in the country were affected by climate change, especially flood and droughts occurred in the dry season, that have hit agricultural production, it is not affected the total production of the country. The harvesting period of rice in 2022 is from August to December 2022 for wet season, and from February to April 2022 for dry season.

For **maize**, the planted area is forecasted to decline from the previous year due to the decreasing price of maize together with the increasing prices of the competing crops. However, the maize production is expected to increase because farmers use improved crop varieties together with favorable weather. The harvesting period of maize is July to September 2022 for wet season, and February to March 2022 for dry season.





Crop Situation in Indonesia 2022

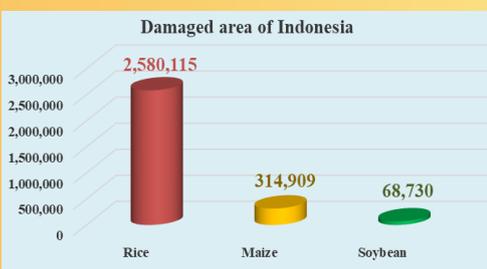


Figure 1: Damage area of Indonesia (Hectare)

The weather in Indonesia in 2022 (2021/22) is favorable for growing crops as there are suitable sunlight, proper temperature, and adequate rainfall for crops due to good water management and irrigation system for planting crops. The amount of rain ranges from 100 to 150 millimeters per day. Four kinds of natural disasters that caused damage in important planting areas of rice, maize, and soybean were floods, droughts, pests, and diseases. Regarding to the **import situation**, Indonesia tends to decrease its import of sugar because the government implements program to increase sugar production through intensification, intensification of sugarcane areas, and construction of new sugar factory. In addition, the spread of **COVID-19** does not affect the production in the country. The situation of five main crops can be described as follow.

The planted area of **cassava** is expected to decrease due to the falling prices of cassava. Consequently, farmers change to grow other crops which give higher prices such as maize, sugarcane, soybean, and horticulture. While cassava yield still increases due to favorable weather and using good varieties. The harvesting period of cassava in 2022 can be divided into 3 phrases which are January to April 2022 for the first crop, May to August 2022 for second phrase, and September to December 2022 for the last crop.

Rice production is forecast to decrease due to the reduction in both planted and harvested areas. The planted area is expected to decrease due to the increasing prices of competing crops such as maize, sugarcane, soybean, and horticulture which increase incentive for farmers to grow these crops in order to get higher incomes. Likewise, the harvested area is declined because some planted areas in the country were affected by floods, droughts, diseases, and pests which caused damage up to 2,580,115 hectares. The harvesting periods in 2022 are from January 2022 to June 2022 for wet season and from July to December 2022 for dry season.

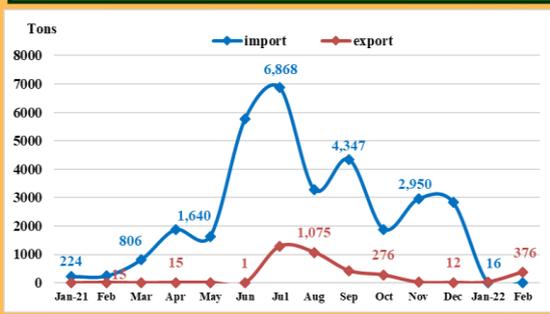


Figure 2: Monthly quantity of rice import and export in 2021-2022

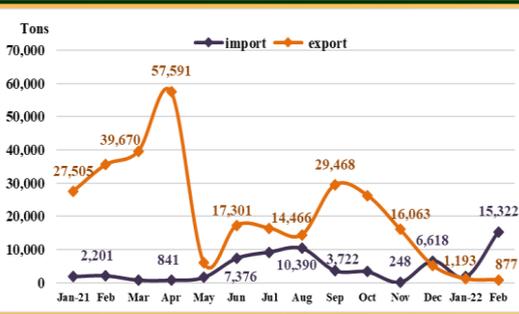


Figure 3: Monthly quantity of cassava import and export in 2021-2022

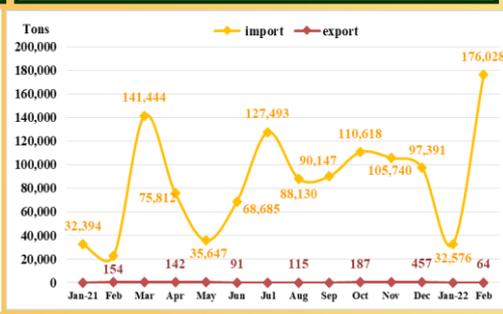


Figure 4: Monthly quantity of maize import and export in 2021-2022

For **sugarcane**, the planted area is expected to increase as the weather is suitable for crop cultivation. Moreover, government is also launching the sugarcane extensification program and facilitates the preparation of quality seeds, improvement of irrigation and distribution of fertilizer, and replace old plants. These government programs are the key factors for increasing sugar production. The harvesting period in 2022 is from February 2022 to December 2022.



Figure 5: Monthly quantity of sugar import and export in 2021-2022

The planted area of **soybean** is expected to increase due to suitable weather for planting crops and government policy. The yield of soybean is expected to decrease due to the natural disasters which are floods, droughts, diseases, and pests. The damaged area is approximately 68,730 hectares. The harvesting periods of soybean in 2022 are divided into 3 phrases which are January to April 2022 for the first crop, May to August 2022 for the second crop, and September to December 2022 for the last crop.

For **maize**, the planted area is expected to increase from previous year because the weather is suitable for planting crops and maize prices rise which increase farmer's incentive to grow maize. Farmers also take good care of crops and select to use good varieties resulting in the increase in yield. The Natural disasters from floods, droughts, diseases, and pests damaged planted areas approximately 314,909 hectares, but it does not affect the whole production. The harvesting period of maize in 2022 can be divided into 3 periods which are during January to April 2022 for the first crop, May to August 2022 for the second crop, and September to December 2022 for the third crop.



Crop Situation in Lao PDR 2022

The weather situation of Lao PDR in 2022 (2021/2022) is recorded with heavy rainfall of around 50 – 100 millimeters per day. Generally, the weather is favorable for cultivating crop as usual as it has appropriate rainfall and sufficient sunlight for plants. Due to the spread of COVID-19, the country's border is temporarily close, affecting the prices and the import-export of agricultural goods. The prices of some agricultural goods such as maize, soybean and cassava have risen as most of the population tends to consume more on domestic products. As a result of increasing demand for agricultural products, the agricultural labors are required more to increase the production in order to sufficient the domestic consumption as well as maintain food security. For the COVID-19's effect on the *agricultural import-export*, it has been recorded with the decrease of rice, maize and soybean imports because the country's border is temporarily close resulted in limited imports. However, the import of sugarcane rises as there is not enough domestic production compared to demand of domestic consumption. For the export situations of rice, maize, and cassava are increased due to the increase of domestic production and higher demand for international consumption. Nevertheless, the exports of sugarcane and soybean become decrease because the country's border is temporarily close resulted in limited exports. The production situations of five main crops are as follows.

For *Rice*, the planted areas are expected to decrease due to the increasing price of competing crop. The production is expected to increase as farmers take good care of crops, together with favorable weather and appropriate rainfall for plants. The harvesting period of rice in 2022 is around from September 2022 to December 2022 in wet season, and from February to May 2022 in the dry season.

For *Sugarcane*, planted area and yield are predicted to increase due to the favorable weather. The sugarcane gets sufficient sunlight, enough water, and governmental support under the project which focuses on producing crops that have the potential to be commercialized for export. The harvesting period of sugarcane in 2022 is around from February 2022 to May 2022.

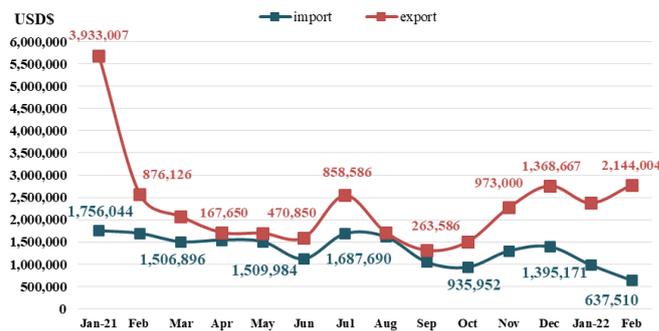


Figure 1: Monthly value of rice import and export in 2021-2022

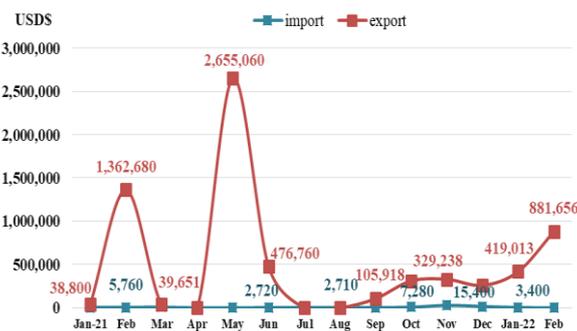


Figure 3: Monthly value of soybean import and export in 2021-2022

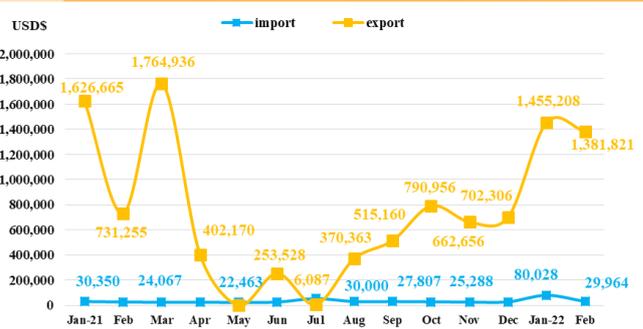


Figure 2: Monthly value of maize import and export in 2021-2022

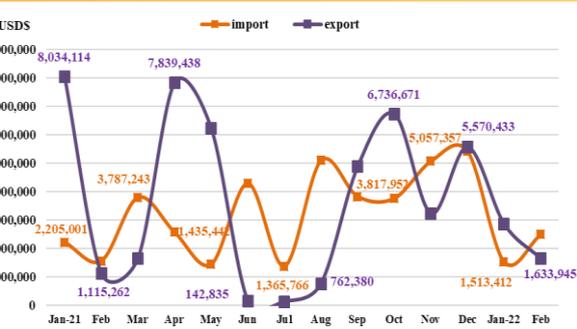


Figure 4: Monthly value of sugar import and export in 2021-2022

For *Soybean*, the planted area and yield are estimated to increase because farmers respond to the rise of soybean price. The yield is expected to increase because of favorable weather, appropriate rainfall for plants, and good taking care of the crops by farmers. The harvesting period of soybean in 2022 is during May 2022 to October 2022 for wet season and November 2021 to February 2022 for dry season.

For *Maize*, the planted area and the yield are estimated to increase due to the favorable weather, the sufficient sunlight and water, together with the rise of the maize price causing the farmers to take good care on crop. The harvesting period of maize in 2022 is around from May 2022 to September 2022 in wet season, and from November 2021 to March 2022 in dry season.

The production of *Cassava* is forecasted to increase due to the increase in planted area and yield. The planted area is expected to increase as the price of cassava goes up. The yield is expected to increase because of favorable weather, appropriate rainfall for plants, and good taking care of the crops by farmers. The harvesting period of cassava in 2022 is during May 2022 to November 2022.





Crop Situation in Myanmar 2022

The weather in Myanmar in 2022 (2021/2022) is generally aberrant. The areas have medium to heavy rainfall with an average amount of 20-50 millimeters per day. However, some areas are facing drought causing the temperature to be hotter than usual. It is suspected to be the consequence of the decreasing of natural resources resulted from deforestation within the country. There was a natural disaster due to heavy rainfall occurred and caused the flood in some areas such as Nay Pyi Taw, Kachin, Kayin, Sagaing, Tanintharyi, Bago, Magwe, Mandalay, Mon, Rakhine, Yangon, Shan, Ayeyawaddy. While, some areas which were Kachin, and Magwe were facing drought. Moreover, the pest-affected areas were Kachin, Bago, and Shan. With regard to the spread of COVID-19, it does not have much impact on the production, price, export, and import of rice, maize, sugarcane, soybean, and cassava as these five crops are still the main commodities for ensuring food security in the country. Therefore, the promotion toward the agricultural production, export, and import is still essential in order to adequately supply the domestic consumption as well as export the goods for country's income. The export situation of cassava is expected to increase due to the increasing crop production resulted from favorable weather. While the exports of rice, maize, soybean and sugar are expected to decrease due to the lack of production in the country. In the meantime, the import of maize and cassava are expected to decrease as these crops productions are already sufficient for the domestic consumption. Nevertheless, rice and soybean are needed to be imported as these productions are not adequate for domestic uses. The production situation of five main crops are as follows.

For **rice**, the planted area rises as the rice price has risen. Nevertheless, the aberrant weather caused by decreasing of natural resources in the country affects the weather to be hotter than usual, flood, drought, diseases, and pests. Consequently, the planted areas were damaged around 6,495 hectares which resulted in declining in its production. The harvesting period of rice in 2022 is around from August 2021 to February 2022 in the wet season, and from February to August 2022 in the dry season.

For **maize**, the planted area and the production rise as the maize price has risen, consequently, the farmers take good care of their crops, use good varieties, and increase the planted areas which led to the increase of the production. Nevertheless, the aberrant weather caused by the decrease of natural resources in the country affects the weather to be hotter than usual and occupied alternately with rain and blustery wind. Thus, the damage of the planted areas are around 4 hectares. The harvesting period of maize in 2022 is around from August 2021 to December 2021 in wet season, and from January to June 2022 in the dry season.

For **sugarcane**, the planted area declined due to the unfavorable weather. However, the production is expected to increase because farmers take good care of crops, use good varieties, and use more fertilizer. The harvesting period of sugarcane is from October 2021 to March 2022.

For **soybean**, the planted area and the production declined due to the unfavorable weather caused by the aberrant weather resulted in the weather to be hotter than usual. Consequently, the planted areas were damaged around 68 hectares. The harvesting period of soybean in 2022 is around from August 2021 to January 2022 in wet season, and from December 2021 to May 2022 in the dry season.

For **cassava**, the planted area and the production rise because the weather is favorable and the cassava price has increased, consequently, farmers take good care of crops, use good varieties, and use more fertilizer. The damaged areas are around 6,430 hectares which were caused by the aberrant weather and the insurgent area of the planted area. The harvesting period of cassava is between September 2021 and June 2022.

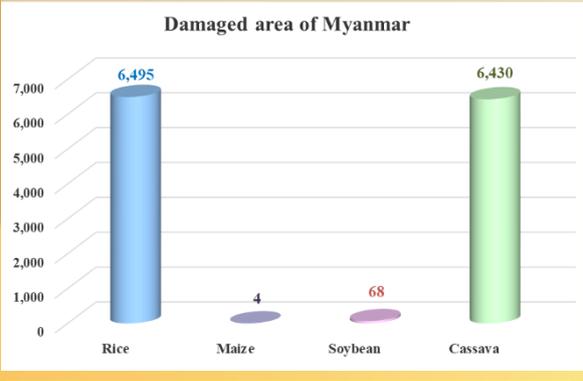


Figure 1: Damaged Area (Hectare)



Figure 2: Monthly quantity of rice export in 2021-2022



Figure 3: Monthly quantity of maize import in 2021-2022



Figure 4: Monthly quantity of maize export in 2021-2022



Figure 5: Monthly quantity of sugar export in 2021-2022



Crop Situation in Philippines 2022



The crop conditions of the Philippines in 2022 (2021/22) have natural disasters in the country which was hit by Typhoon Maring, and Typhoon Odette. These typhoons caused damage area in many provinces which were Cagayan, Surigao del Norte, Dinagat Islands, Southern Leyte, Bohol, Cebu, Negros Oriental, Palawan, Negros Occidental, Antique, Siquijor, and Camiguin. They also directly impacted the cultivation of rice and maize. The effect of damage from natural disaster are caused by strong wind, heavy rainfall which is more than 151 millimeter per day. However, the number of total damaged area of crop have not reported yet because the crop situations of rice, maize, cassava, and soybean cannot be assessed in this time. For the import and export of sugar, they were declined due to lower demand of sugar-based products by domestic and foreign markets. With regard to the spread of **COVID-19**, it is great to hear that the situation of import-export crop production and food security of the Philippines is not affected by COVID-19.

For **Rice**, the harvested area and yield are estimated to increase due to sufficient rainfall and irrigation water from land preparation to planting periods together with government supporting in terms of seed's distributions and newly constructed irrigation facilities. The harvesting period of rice in 2022 is from July to December 2021 for wet season, and January to June 2022 for dry season.

For **Maize**, the planted area and yield are estimated to decrease due to unfavorable weather impacted by Typhoon Maring and Typhoon Odette. Moreover, farmers have changed of cropping Calendar and shifting to other crops. The harvesting period of Maize in 2022 is from July to December 2021 for wet season, and January to June 2022 for dry season.



Figure 1: Monthly quantity of rice import in 2021-2022

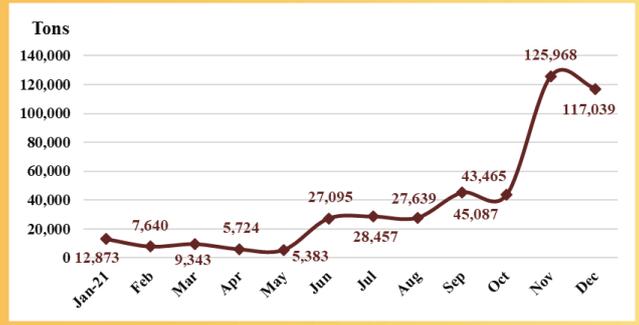


Figure 3: Monthly quantity of maize import in 2021-2022



Figure 2: Monthly quantity of rice export in 2021-2022

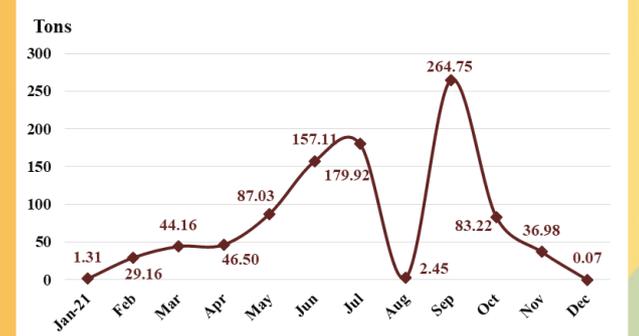


Figure 4: Monthly quantity of maize export in 2021-2022

For **Sugarcane**, the harvested area is expected to increase because small farmers have supported from SRA's Social Credit Programs and there is adequate rainfall during cane formation. The production is also expected to increase because the good quality of canes harvested (first cropping) as compared to last year which was already ratooned. The harvesting period of sugarcane in 2022 is from September 2021 to August 2022.

The information of **soybean and cassava** in crop year 2022 is not available.

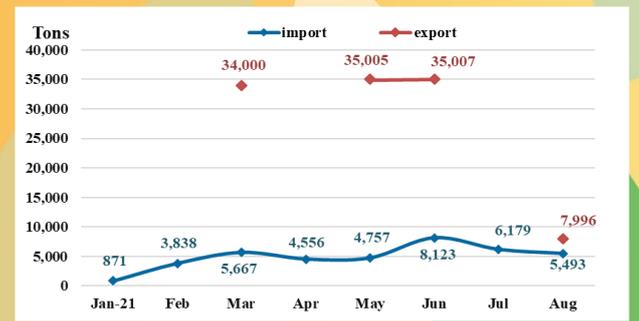


Figure 5: Monthly quantity of sugar import and export in 2021-2022





Crop Situation in Thailand 2022

The weather in Thailand in 2022 (2022/2023) comparing to 2021 (2021/2022) has good conditions. With appropriate rainfall, sufficient sunlight for the plants, and good water management and irrigation system in the country which allows the farmers to use water per crops' need, farmers are capable to cultivate crops for the whole year. For the spread of **COVID-19**, it does not affect the agricultural production as the production begins to come back to the normal state in order to provide enough for the domestic consumption and maintain the food security. In terms of **importing situation**, the imports of maize, soybean, and cassava are expected to increase because the domestic productions of these commodities are insufficient for the needs as the increasing demand from animal feed manufacturers and shortage of maize, soybean, and cassava productions per domestic consumption in Thailand. The sugarcane import decreases as the domestic production is sufficient for the needs. For **the export situation**, the exports of rice, sugar, and cassava become greater because trading partner countries have increased purchasing power after economic recovery from the COVID-19 pandemic. The exports of maize and soybean are forecast to decrease because the domestic productions are insufficient for the domestic consumption. In addition, the demand of maize for the animal feed industry in the country has increased.

Rice production in 2022 (crop year 2022/23) is predicted to increase due to increase in planted area and yield. The planted area and yield of rice are expected to increase from the previous year as there is an income insurance scheme from government to support rice farmers to mitigate price risks together with favorable weather and sufficient water which increases farmer's incentive to change from growing other crops to rice. The harvesting period of rice in 2022 is around August 2022 to April 2023 for wet season, and February to October 2023 for dry season.



Figure 1: Monthly quantity of rice export in 2021-2022

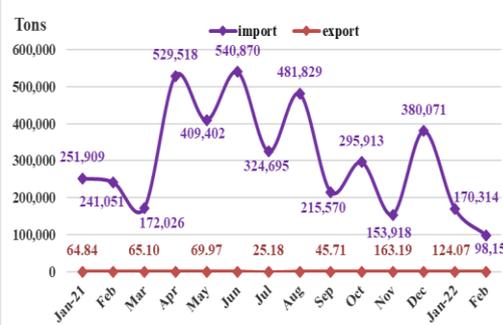


Figure 2: Monthly quantity of soybean import and export in 2021-2022

The production situation of **maize** in 2022 (crop year 2022/23) is better than last year. The planted area tends to go up from previous year because the government has an income insurance scheme to help farmers to mitigate risks from price fluctuation together with the rising price of maize and favorable weather which increases farmer's incentive to expand planted area of maize. The yield is also predicted to increase due to the decreasing of Fall Armyworm Outbreak and favorable weather. The harvesting period of maize in 2022 is from June 2022 to February 2023 for wet season, and February to May 2023 for dry season.

The planted area and production of **cassava** in 2022 (crop year 2022/23) are forecast to increase from last year because the government has an income insurance scheme to help farmers to mitigate risks from price fluctuation together with the rising price of cassava which increases farmer's incentive to expand planted area of cassava. For cassava yield, it tends to rise from last year due to the decreasing of Cassava Mosaic Disease and favorable weather. The harvesting period of cassava in 2022 is from October 2022 to September 2023.

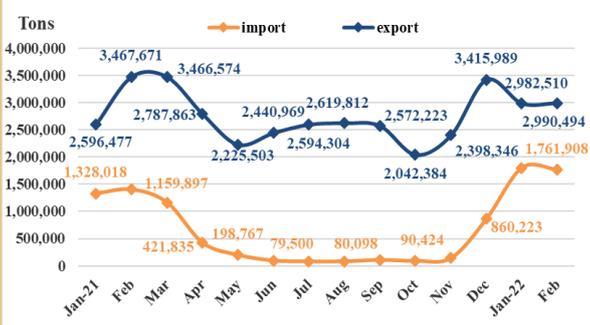


Figure 3: Monthly quantity of cassava import and export in 2021-2022

The planted area of **soybean** in 2022 (crop year 2022/23) tends to decrease from the last year due to the declining of soybean price, increasing of competing crops prices, labor shortage, high production costs, and lack of the development of mechanical soybean harvesting technology. The harvesting period of soybean in 2022 is from July 2022 to December 2022 for wet season, January and to May 2023 for dry season.

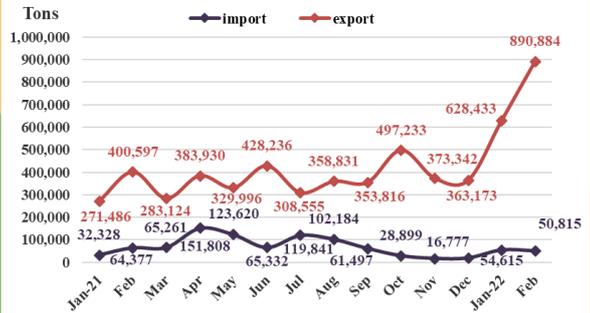


Figure 4: Monthly quantity of sugar import and export in 2021-2022

For **sugarcane**, the planted area and yield in 2022 (crop year 2022/23) tend to increase because sugarcane price increases together with favorable weather. The harvesting period of sugarcane in 2022 is from December 2022 to April 2023.



Crop Situation in Vietnam 2022



The weather condition, impact of COVID-19 on crop production, and trade of Vietnam in 2022 (for all agricultural commodities): Agricultural production in the Northern provinces in February 2022 experienced severe cold weather conditions, affecting the growth and development of plants. Changes in weather (dry and unseasonal rains) in the Southeast region have negatively affected the yield and the quality of the crops. Agricultural production in general during the first months of 2022 has been facing many difficulties such as the increased input costs, labor scarcity due to **COVID-19**, unfavorable weather condition. Trade of Vietnam's agricultural sector increases in the first 3 months of 2022. However, the circulation of agricultural products imported from Vietnam across the northern border in recent months has faced many difficulties because China-the main import and export market of Vietnam's agricultural products, has tightened measures to manage goods through customs clearance, in order to prevent COVID-19 cases in border areas.

Unfavorable weather in the first period of 2022 has little impact on **maize and soybean** production. In the first 3 months of 2022, the price of imported maize increased by 31% and the price of imported soybeans increased by 14.6%. This will be an opportunity for domestic farmers to increase the area planted to maize and soybean.

Although the weather at the beginning of the crop is unfavorable, the yield of dry **rice** in Vietnam is expected to increase compared to 2021. However, the profit of the people is low due to the increase in input costs. In the first three months of 2022, the price of imported fertilizers increased by 61.9%, while the price of rice for export decreased by 10.8%.

The Vietnam **Sugar** Association (VSSA) forecasts abundant sugar supplies with no shortage of sugar in the following months. The market advantage still belongs to imported sugars. Vietnam's official sugar imports from Thailand decreased sharply because Vietnam imposed anti-dumping tax on sugar products imported from Thailand. However, smuggled or fraudulently imported sugar with very low prices causing the sugar industry to still not be able to recover as strongly as expected. The domestic sugar price will fluctuate in line with the world sugar price. No official information about the impact of COVID-19 on sugar industry of Vietnam is available. Export value of Vietnam's sugar in the first 3 months of 2022 is estimated to increase considerably by 62% compared to the same period of 2021, while import value rise slightly by 5.9%.

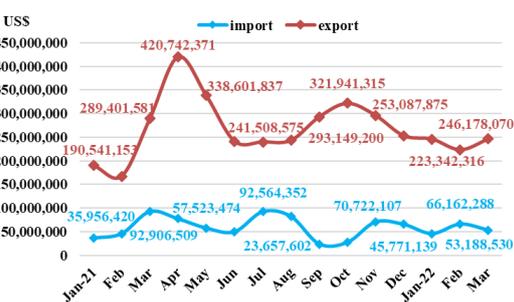


Figure 1: Monthly value of rice import and export in 2021-2022

According to the Vietnam Cassava Association, the **cassava** industry is facing many difficulties due to the large number of inventories due to the COVID-19 epidemic. Many businesses no longer have money to buy raw materials from farmers, forcing them to stop production activities. Besides, cassava leaf mosaic disease has not had effective prevention measures, causing the risk of reducing yield and output. In the first 3 months of 2022, export value of Vietnam's cassava is estimated to rise by 15.5% compared to the same period of 2021, while import value recorded significant decline (drop by 85.2%).

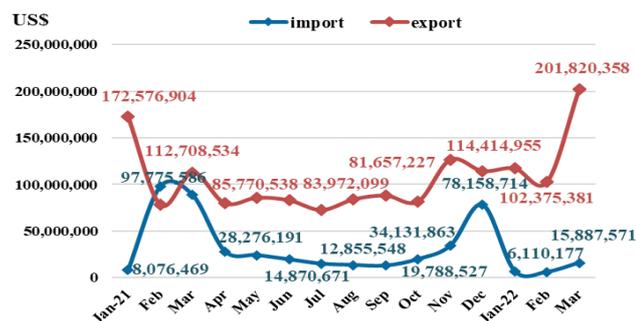


Figure 6: Monthly value of cassava import and export in 2021-2022



Figure 2: Monthly value of maize import in 2021-2022



Figure 3: Monthly value of maize export in 2021-2022

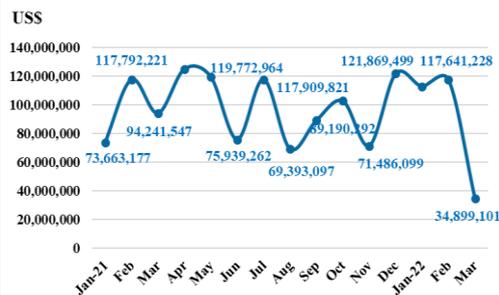


Figure 4: Monthly value of soybean import in 2021-2022

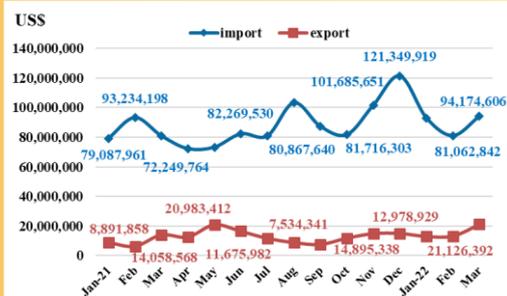


Figure 5: Monthly value of sugar import and export in 2021-2022



