ASEAN Early Warning Information
CROP SITUATION

No.32 March 2024

Released by AFSIS Secretariat
Office of Agricultural Economics (OAE)
Ministry of Agricultural and Cooperatives
Bangkok, Thailand.
www.aptfsis.org

AFSIS
ASEAN Food Security Information System

Brunei Darussalam

Crop Situation in 2024 (P.1/2)

In 2024 (2023/2024), Brunei is expected to experience favorable weather conditions for crop cultivation. All regions benefit from sufficient sunlight, a temperature range of 25 to 35 degrees Celsius with irrigation systems and efficient water management practices. The effects of climate change and global warming are noticeable, with the rainfall average being lower than normal, except for moderate rainfall between October 2023 and March 2024. The average rainfall is moderate, typically ranging from 20 to 50 millimeters per day. However, irrigation infrastructure enables rice fields to be irrigated during less frequent rainfall periods. Despite the impact of climate change and global warming, farmers could adapt their practices to mitigate risks and minimize damage from natural disasters. They have adjusted their cultivation plans and planting times to align with changing weather patterns, optimizing crop growth. Additionally, governments have played an important role in risk mitigation efforts by implementing various policies. This includes supporting farmers with access to new technologies and irrigation systems to address challenges related to water sources and ensure sustainable agriculture.

For rice in 2024, rice situation is expected to increase in both planted areas and production. The extension of hybrid rice cultivation has contributed to a boost in productivity and overall planted area. The increase in production is further supported by favorable weather conditions, increased access to fertilizer, and the use of crop varieties. The harvesting period for rice in 2024 is from February 2024 to May 2024 for the wet season and from July 2024 to October 2024 for the dry season. Furthermore, there has been an increase in imports in 2024 compared to 2023. (Figure 1).

For sugarcane in 2024, production is expected to increase due to an expansion in the land area dedicated to sugarcane plantations. The continuous harvesting and planting of sugarcane throughout the year 2024 contribute to this increase. Additionally, the sugar import situation in 2024 indicates a slight increase compared to 2023. (Figure 2).

For maize in 2024, maize situation is expected to increase through expansions in both planted areas and production. The increase in planted areas is attributed to farmers responding to price incentives and favorable weather conditions. The increase in production was contributed by improved crop care practices, increased access to fertilizer, the adoption of high-quality seed varieties, and the expansion of land dedicated to sweet corn cultivation. Additionally, high consumer demand plays a role in driving production up, which increases imports. In 2024, maize will be harvested and planted continuously throughout the year.

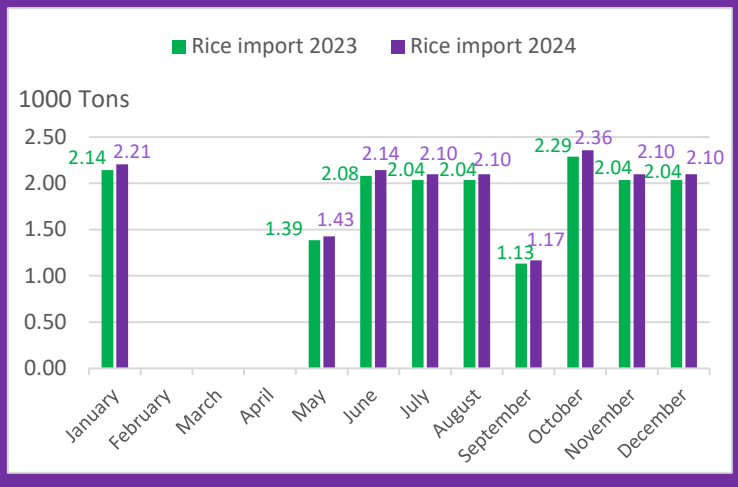

Figure 1: Monthly quantity of rice import in 2023 – 2024

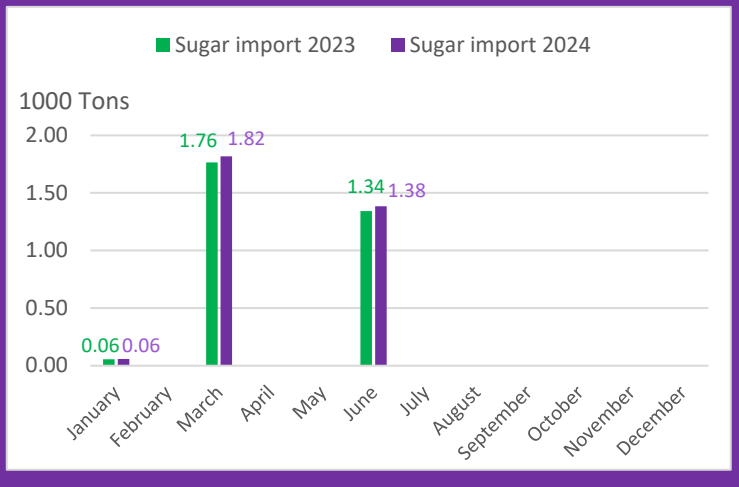

Figure 2: Monthly quantity of sugar import in 2023 – 2024

Brunei Darussalam

Crop Situation in 2024 (P.2/2)

For soybean in 2024, the soybean import situation is expected to increase in 2024 compared to 2023 slightly (Figure 3).

For cassava in 2024, both the planted area and production are expected to increase. The increase in planted area is attributed to expansion of land dedicated to cassava cultivation and farmers responding to price increases. Additionally, production is expected to increase due to good crop management practices, the use of improved varieties, and the demand for value-added and processed products such as crisps, fritters, and desserts. Cassava harvesting and planting will occur continuously throughout the year 2024. The import situation is expected to show low imports in February-March 2024 and May-June 2024 (Figure 4).

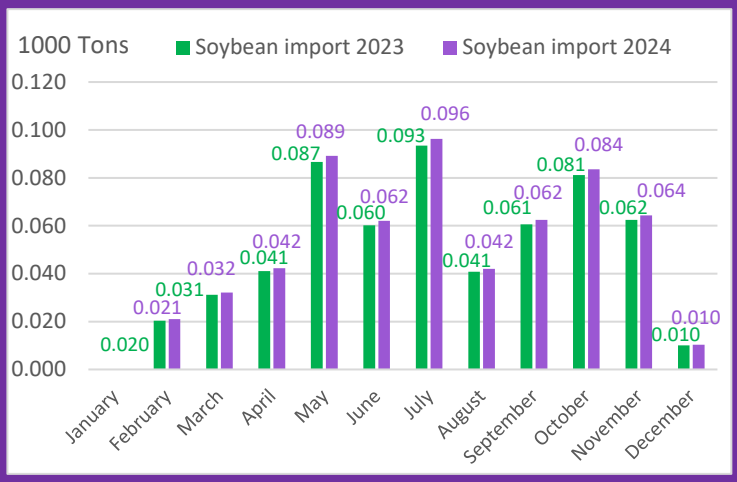

Figure 3: Monthly quantity of soybean import in 2023 – 2024

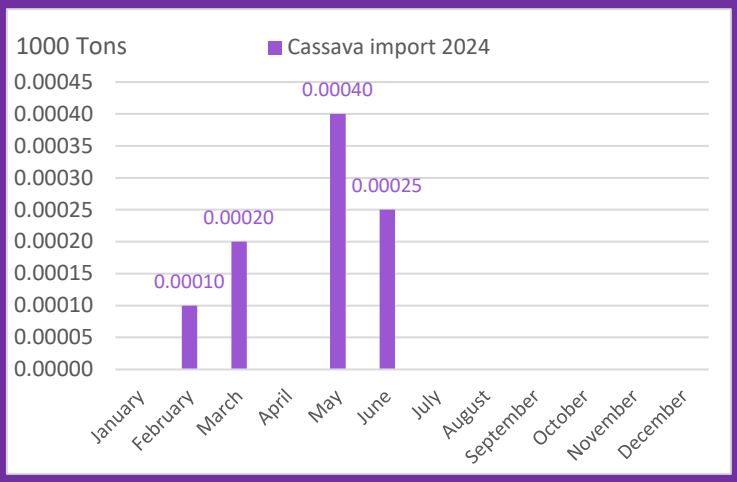

Figure 4: Monthly quantity of cassava import in 2024

CAMBODIA

Crop Situation in 2024 (P.1/2)

The weather in Cambodia as a whole will not be favorable to crop cultivation in 2024. The amount of rainfall each day has been minimal, ranging from 0.5 to 20 millimetres. Global warming is influencing these conditions; in the dry season of 2024, productions increased by 22% over the previous year due to rising paddy prices; in the wet season of 2024, planting may be delayed due to rainy predictions (this year's average is lower than many years' averages) In addition, El Niño may cause natural disasters that could affect crop production in the area.

As mentioned above, Cambodia is facing extreme drought conditions, exacerbated by the effects of climate change and global warming. The areas most affected by drought and flooding in crops2023, especially paddy production include Banteay Meanchey, Battambang, Pursat and Tbong Khmom, while some regions are experiencing storms and disasters. The damage area to crops, specifically rice commodities, has been reported at approximately 14,479 hectares. The upcoming wet season is predicted to experience drought due to lower rainfall compared to previous years. The ongoing effects of climate change and global warming in many regions, farmers in Cambodia are adapting to mitigate risks. They are adjusting their cultivation plans and planting times to suit changing weather patterns. Additionally, farmers are using crop varieties that are resistant to extreme temperatures. The government is providing assistance by promoting the use of technologies for managing water sources and increasing access to credit to support farmers. These measures aim to help farmers cope with the challenges posed by climate change and ensure the sustainability of agricultural production in Cambodia.

For maize in 2024, the production of maize in Cambodia will increase. The increase is attributed to farmers having better crop care practices and increased fertilizer use. The harvesting period for maize in 2024 was from August 2024 to October 2024 for the wet season and from Mar 2024 to April 2024 for the dry season.

For sugarcane in 2024, the planted area in Cambodia has increased. This increase can be attributed to farmers responding to price increases and favorable government policies supporting sugarcane cultivation. The harvesting period for sugarcane in 2024 was scheduled for November 2024 through December 2024, with harvesting potentially extending into January 2024.

For soybeans in 2024, the harvesting period for soybeans in 2024 is set to occur from September 2024 to October 2024.

For cassava in 2024, the planted area and production of cassava in Cambodia have increased. The increase in planted area can be attributed to farmers responding to price increases. The production increase is due to farmers adopting better crop care practices and increase use of fertilizers. The harvesting period for cassava in 2024 was scheduled for November 2024 through January 2025.

Crop Situation in 2024 (P.2/2)

For rice in 2024, the planted area and production of rice in Cambodia have increased. The increase in planted area can be attributed to farmers responding to price increases and government interventions to support farmers affected by flooding and drought. The production increase is attributed to good crop care practices and the use of high-quality varieties. However, some regions experienced a decrease in production due to flood and drought. The harvesting period for rice in 2024 was from August 2024 to December 2024 for the wet season and from February 2024 to April 2024 for the dry season. Furthermore, the trend of rice imports in 2023 exhibited fluctuations. (Figure 5).

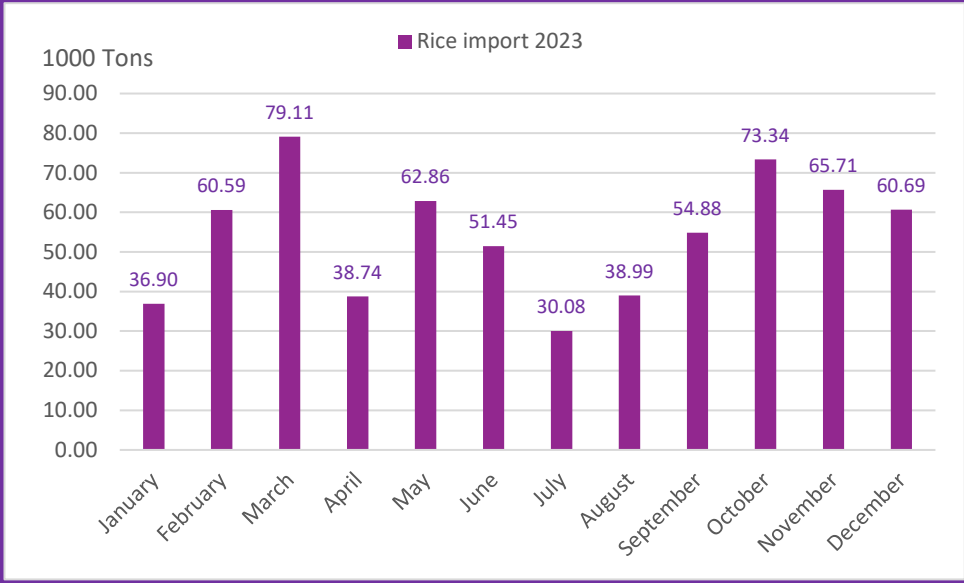

Figure 5: Monthly quantity of rice import in 2023

INDONESIA

Crop Situation in 2024 (P.1/4)

The weather in Indonesia in 2024 (2023/24) is favorable for growing crops as there was suitable sunlight (more than 220 W/m2) with temperature around 35–37 degrees Celsius. The adequate rainfall for crops is due to good water management and irrigation systems for planting crops. The information of Indonesia has the opportunity to experience rainfall with:

1.) The low category has 0.5–20 mm/day.

2.) The medium has a volume ranging from 20 to 50 mm/day.

3.) The high category has over 50–100 mm/day.

In 2024, the agriculture in Indonesia also experiences the impacts of climate change and global warming. The onset of the dry season is forecasted to occur in April 2024, with a 19% chance of starting in May 2024 and another 19% chance of starting in June 2024. This marks a 15% earlier start compared to the normal onset, aligning with the trend observed in the previous year (25%), with a 40% probability of starting in autumn. The rainfall patterns during the 2024 dry season are expected to be either normal or above normal, with the peak of the dry season anticipated in July and August of 2024. The total area affected by weather and natural disasters from January to December 2023 were 106,863 hectares for rice, 10,884 hectares for maize, and 2,835 hectares for soybean.

However, the farmers were adapting to the ongoing effects of climate change and global warming by adjusting their cultivation plans and planting times to suit changing weather patterns. They are also using crop varieties that are resistant to extreme temperatures. The Indonesian government has implemented various adaptation and mitigation efforts to address the impacts of climate change, particularly those related to El Niño. These efforts include:

- Identifying and mapping drought-affected areas, categorizing them into red, yellow, and green zones, to prioritize mitigation programs. This includes implementing mitigation programs covering 1000 hectares per district and the El Niño National Movement (Gernas) in 10 provinces and 100 districts, aiming to increase planting by 500,000 hectares.

- To support farmers accelerating planting activities and increasing the availability of agricultural machinery to support this effort will mitigate the effects of reduced rainfall.

- Providing financial support through the Kredit Usaha Rakyat (KUR) program and agricultural insurance to help farmers cope with the impacts of climate change and ensure food security.

INDONESIA

Crop Situation in 2024 (P.2/4)

For rice in 2024, the planted area and production are expected to increase. The planted area is expected to increase due to the Ministry of Agriculture's efforts to boost rice production, including expanded rice planting programs, and farmers responded to price increases. The increase in production is attributed to several factors, including favorable weather conditions, good crop care practices, increased use of fertilizers, and the use of rice varieties. The harvesting periods for rice in 2024 were from October 2023 to March 2024 for the wet season and from April 2024 to September 2024 for the dry season. The trend of rice imports increased in 2023, while the trend of rice exports decreased, with a low export quantity in 2023 (Figure 6-7).

For maize in 2024, both the planted area and production are expected to increase. The planted area is expected to increase due to farmers responding to price increases and support from government policies, including special assistance programs. This increase in production is facilitated by favorable weather conditions for planting crops, farmers' diligent care of crops, and the selection of crop varieties. The harvesting periods for maize in 2024 are divided into three periods: January 2024 to April 2024 for the first crop, May 2024 to August 2024 for the second crop, and September 2024 to December 2024 for the third crop. The trend of maize imports increased in 2023, while export trends are projected to decline significantly in 2023 (Figure 8-9).

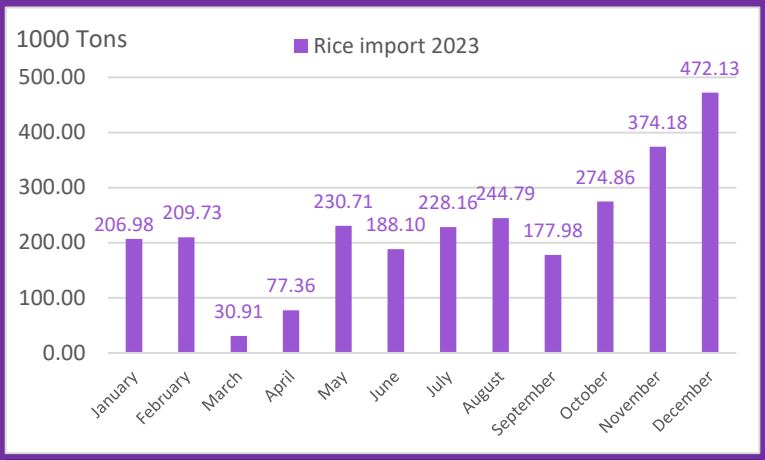

Figure 6: Monthly quantity of rice import in 2023

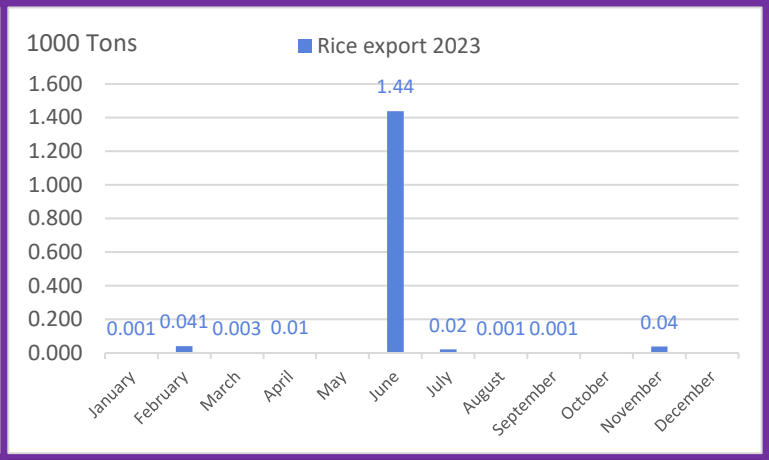

Figure 7: Monthly quantity of rice export in 2023

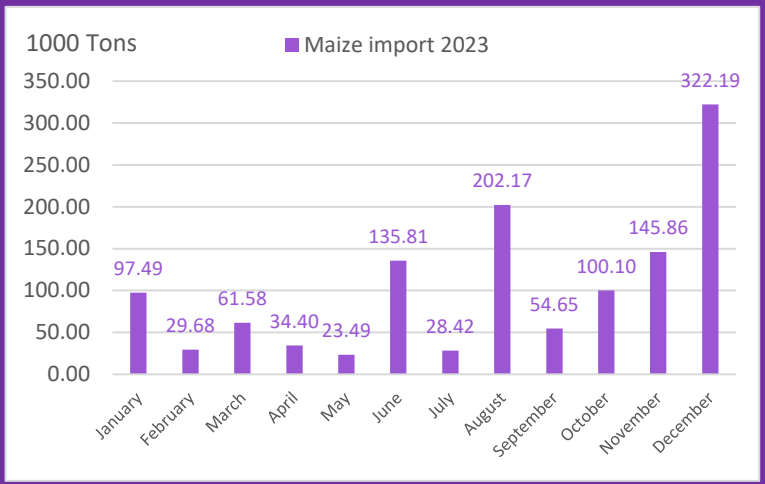

Figure 8: Monthly quantity of maize import in 2023

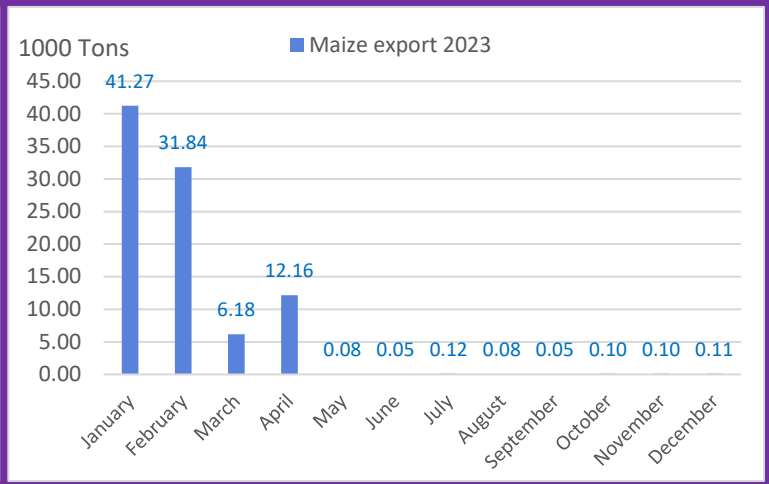

Figure 9: Monthly quantity of maize export in 2023

Crop Situation in 2024 (P.3/4)

For sugarcane in 2024, Indonesia is expected to increase in both the planted area and production. The expansion of the planted area is supported by government policies aimed at extending sugarcane planting areas and providing assistance to farmers. The increase in production is attributed to intensification programs, particularly through ratoon treatment of sugarcane plants, which enhances productivity. The harvesting period for sugarcane in 2024 is from January 2024 to November 2024, providing ample time for harvesting and processing the crop. The sugar import and export trend were volatile in 2023 (Figure 10-11).

For soybeans in 2024, the planted area and production area will increase. The planted area increases due to favorable weather, and the Ministry of Agriculture encourages an increase in soybean production by extending the planting program. The production is expected to increase due to the use of a good variety. The harvesting periods of soybeans in 2024 are divided into three periods: January 2024 to April 2024 for the first crop, May 2024 to August 2024 for the second crop, and September 2024 to December 2024 for the third crop. The import and export soybeans trend were unstable in 2023 (Figure 12-13).

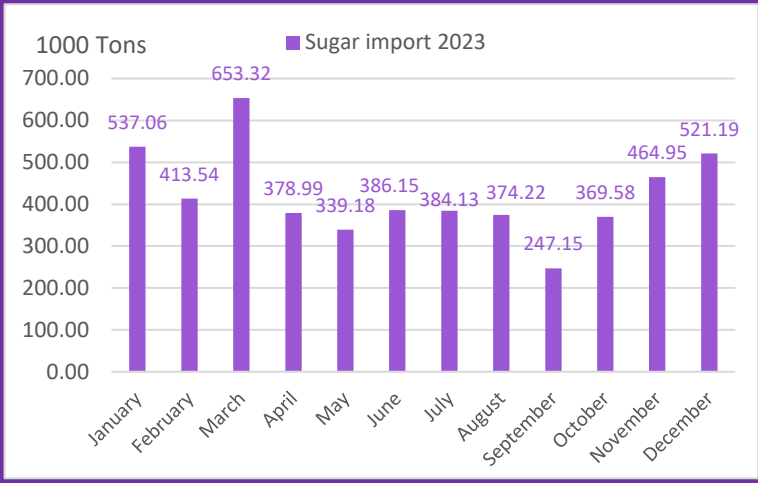

Figure 10: Monthly quantity of sugar import in 2023

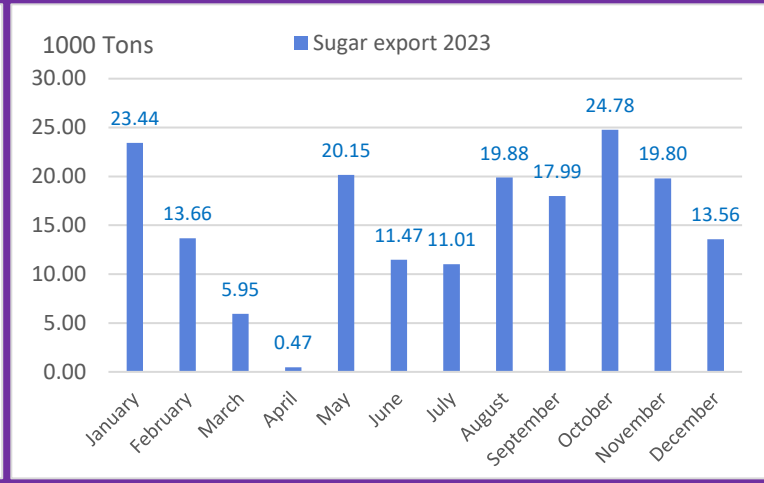

Figure 11: Monthly quantity of sugar export in 2023

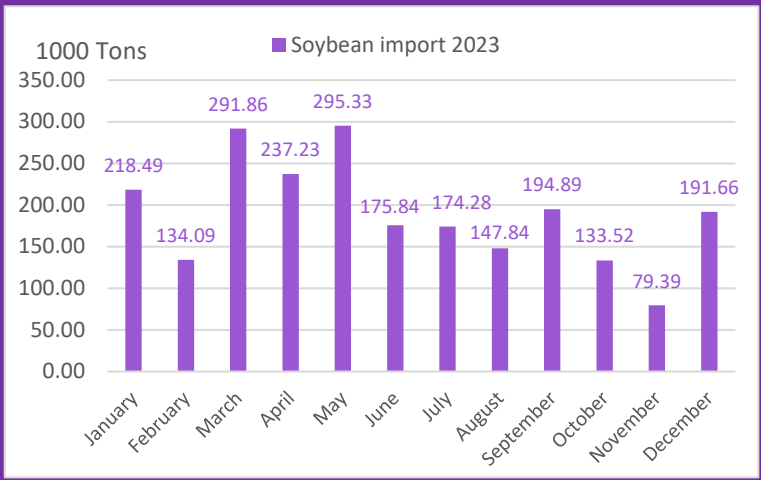

Figure 12: Monthly quantity of soybean import in 2023

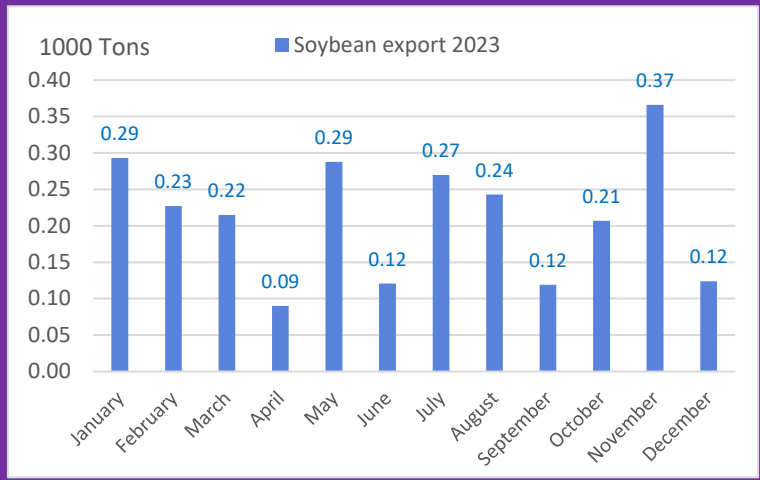

Figure 13: Monthly quantity of soybean export in 2023

Crop Situation in 2024 (P.4/4)

For cassava in 2024, both the planted area and production are expected to increase. The planted area expected to increase due to favorable weather conditions for crop cultivation and an increase in crop prices, incentivizing farmers to expand cassava planting. The increase in production is attributed to farmers' diligent care of crops, the selection of high-quality varieties, and an increase in fertilizer use. The harvesting periods for cassava in 2024 are divided into three periods: January 2024 to April 2024 for the first crop, May 2024 to August 2024 for the second phase, and September 2024 to December 2024 for the third crop. The import of cassava trend decreased in 2023, while export trends exhibited fluctuations in 2023 (Figure 14-15).

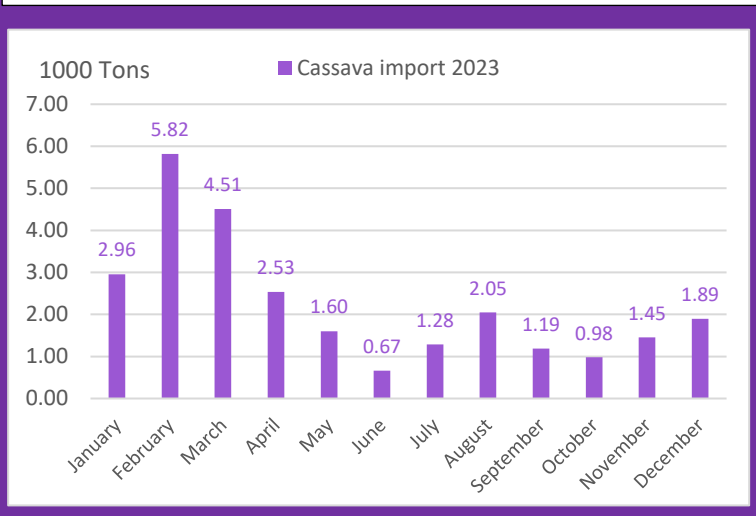

Figure 14: Monthly quantity of cassava import in 2023

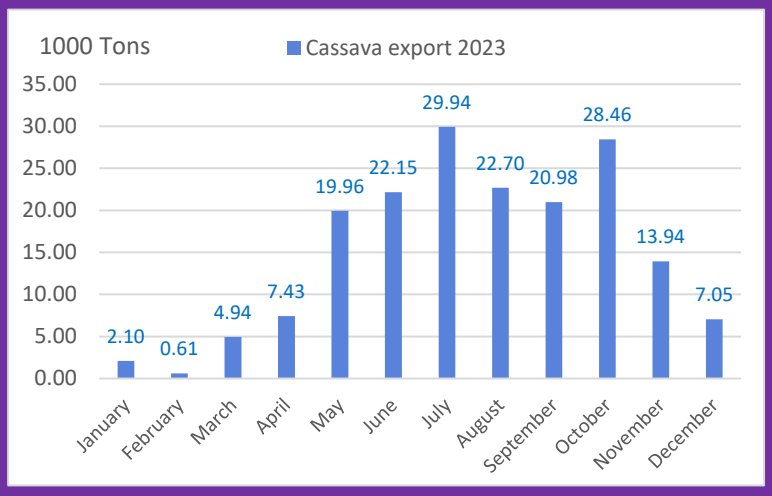

Figure 15: Monthly quantity of cassava export in 2023

Crop Situation in 2024 (P.1/3)

In 2024 (2023/2024), the weather situation is expected to be favorable weather with sufficient sunlight and appropriate rainfall ranging from 20 to 50 millimeters. This will enable farmers to maintain a stock of water resources for their crops. Although the impact of climate change results in higher temperatures than usual, farmers can adapt to mitigate risks and damage from natural disasters caused by climate change or global warming by using good varieties of crops that are resistant to these changes. Moreover, the government has implemented various policies to mitigate risks and damage from natural disasters for farmers, such as being proactive in supporting the agricultural sector by implementing new technologies and expanding channels for farmers to access credit. Additionally, collaborative efforts between farmers and the government in water management have proven instrumental in mitigating the damage caused by natural disasters.

For rice in 2024, the planted area is expected to decrease due to an increase in the price of competing crops and farmers switching to high-cash crops. The production also decreases because the decrease in planted area. The rice growth is in the young panicle forming to the grain-filling stage. The harvesting period for rice in 2024 is from October 2024 to December 2024 for the wet season and from March 2024 to May 2024 for the dry season. The decrease in both imports and exports have occurred due to various factors. The decrease local demand led to a decrease in rice imports (Figure 16). Additionally, the decrease in domestic production led to a decrease in rice exports (Figure 17).

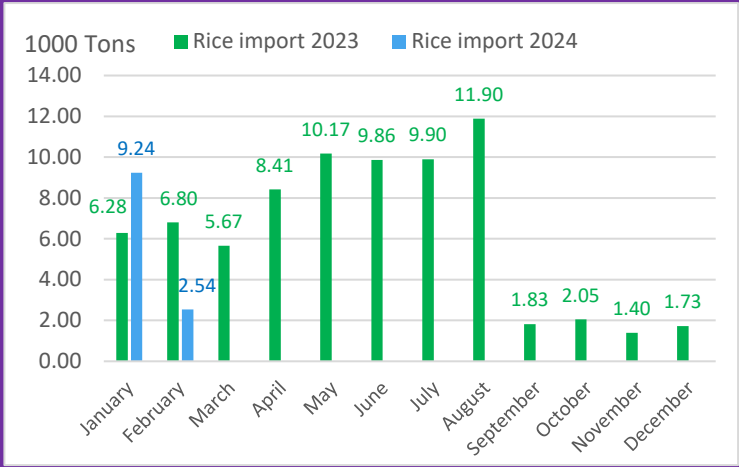

Figure 16: Monthly quantity of rice import in 2023 - 2024

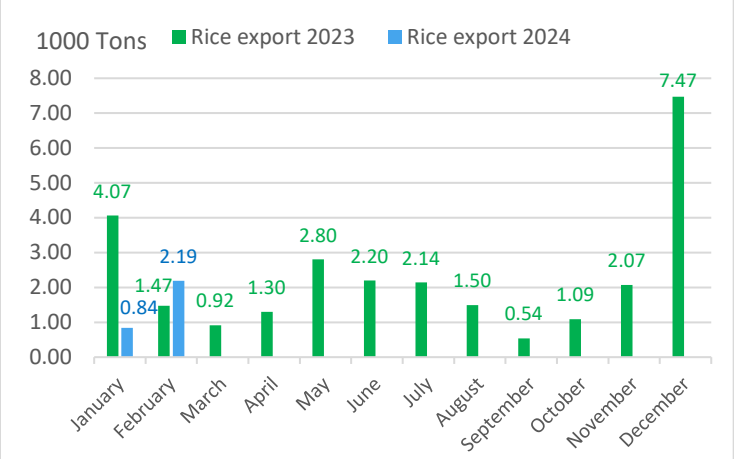

Figure 17: Monthly quantity of rice export in 2023 - 2024

Crop Situation in 2024 (P.2/3)

For maize in 2024, the increase in planted area is attributed to farmers responding to price increases and benefiting from government policies. The production increase is due to good crop care and using the crop varieties for cultivation. The harvesting period for maize in 2024 is from September 2024 to November 2024 for the wet season and from January 2024 to May 2024 for the dry season. The import and export situations are opposite. The increase in domestic demand has led to an increase in maize imports, while the demand from trading countries has decreased (Figure 18), resulting in a decrease in maize exports (Figure 19).

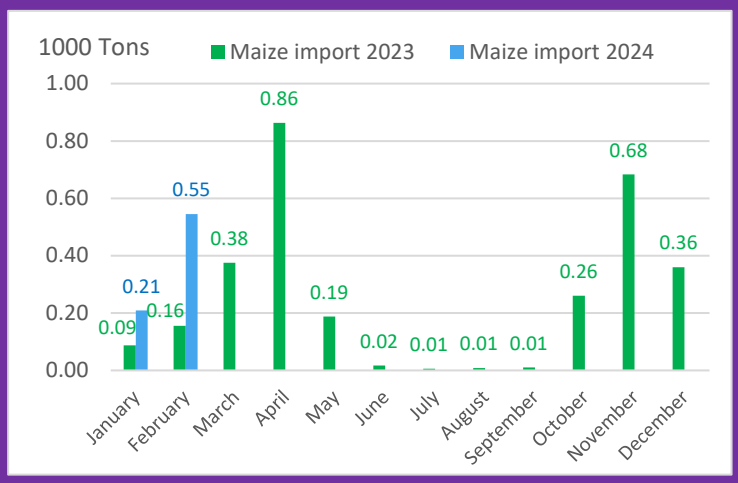

Figure 18: Monthly quantity of maize import in 2023 - 2024

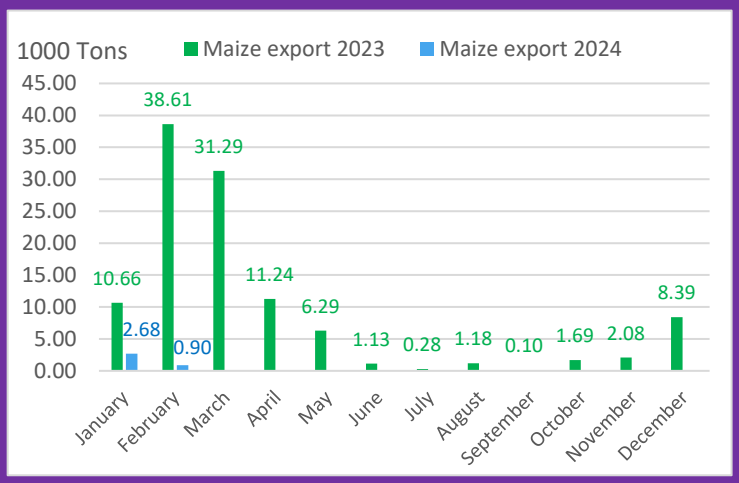

Figure 19: Monthly quantity of maize export in 2023 - 2024

For sugarcane in 2024, the planted area and production are expected to decrease due to an increase in the price of competing crops, and farmers responded to the price decrease. The increase in both imports and exports occurred due to various factors. The reduction in domestic production leads to an increase in sugar imports to meet local demand (Figure 20). Similarly, the increased demand from trading countries leads to an increase in sugar exports (Figure 21).

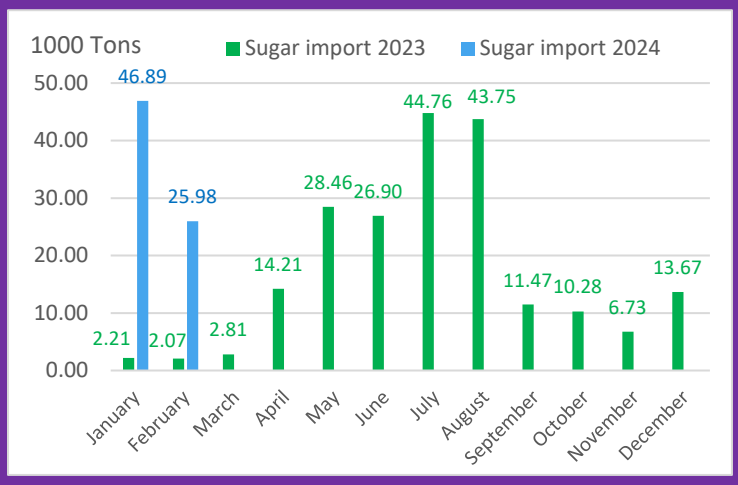

Figure 20: Monthly quantity of sugar import in 2023 -2024

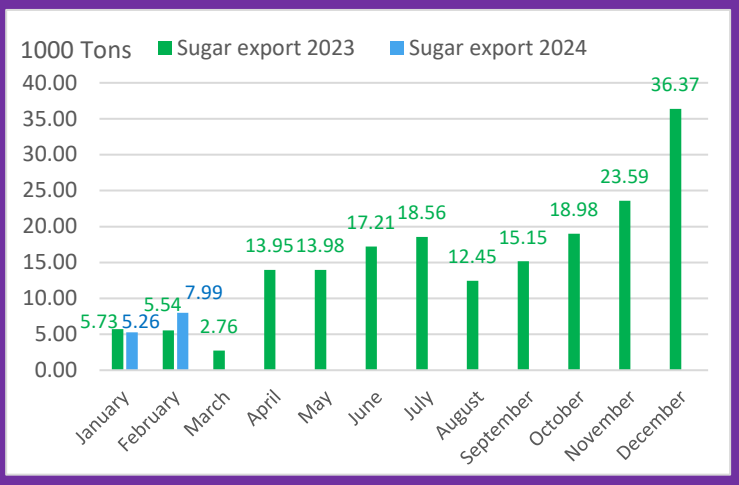

Figure 21: Monthly quantity of sugar export in 2023 -2024

LAO PDR

Crop Situation in 2024 (P.3/3)

For soybeans in 2024, the planted area and production are expected to decrease due to an increase in the price of competing crops and farmers switching to high-cash crops. The harvesting period for soybeans in 2024 is from September 2024 to November 2024 for the wet season and from February 2024 to March 2024 for the dry season. The increase in both imports and exports occurred due to different factors. The decrease in domestic production leads to an increase in soybean imports to meet local demand (Figure 22). Furthermore, the increased demand from trading countries leads to an increase in soybean exports (Figure 23).

For cassava in 2024, the planted area and production are expected to decrease due to an increase in the price of competing crops. The harvesting period for cassava in 2024 is from December 2024 to March 2024. The import and export dynamics are opposite. The reduction in domestic production results in an increase in cassava imports (Figure 24), and the low demand from trading countries leads to a decrease in cassava exports (Figure 25).

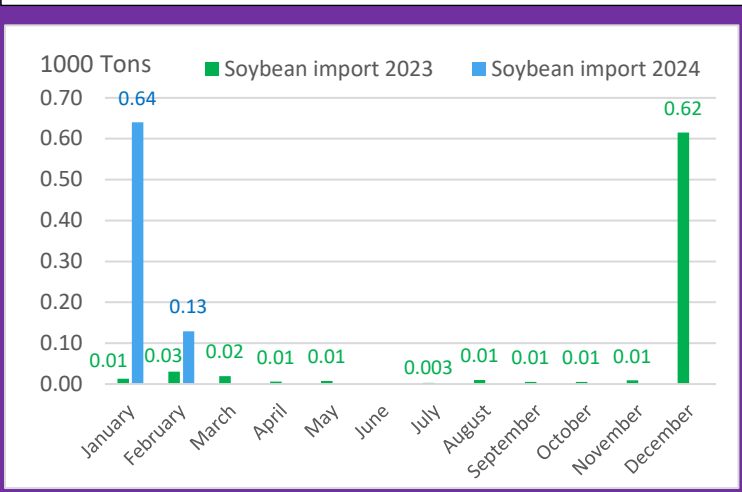

Figure 22: Monthly quantity of soybean import in 2023 - 2024

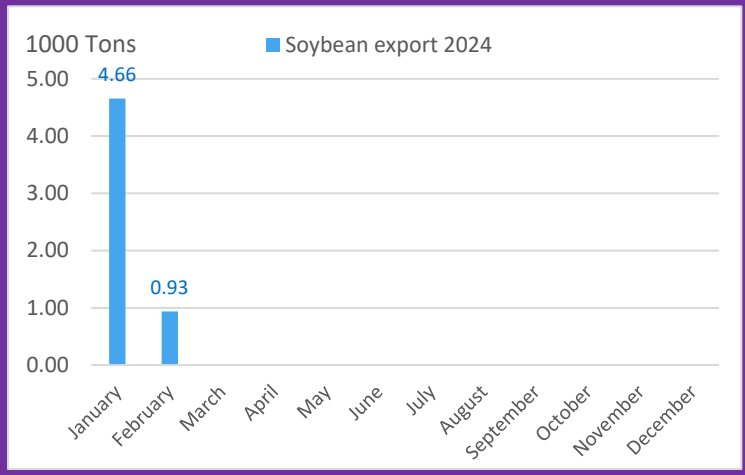

Figure 23: Monthly quantity of soybean export in 2024

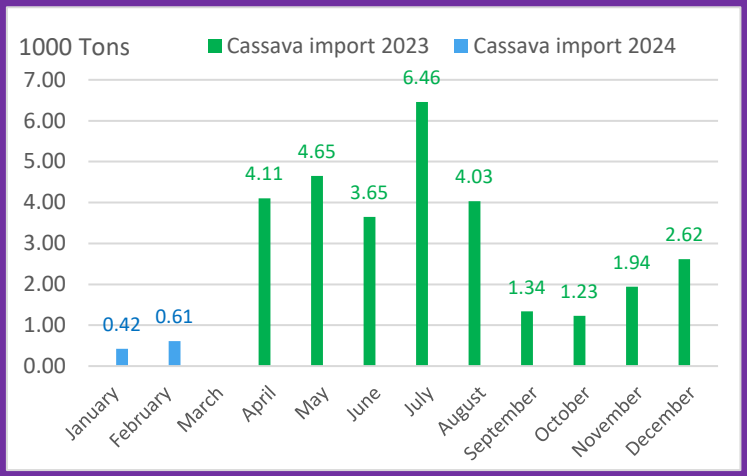

Figure 24: Monthly quantity of cassava import in 2023 - 2024

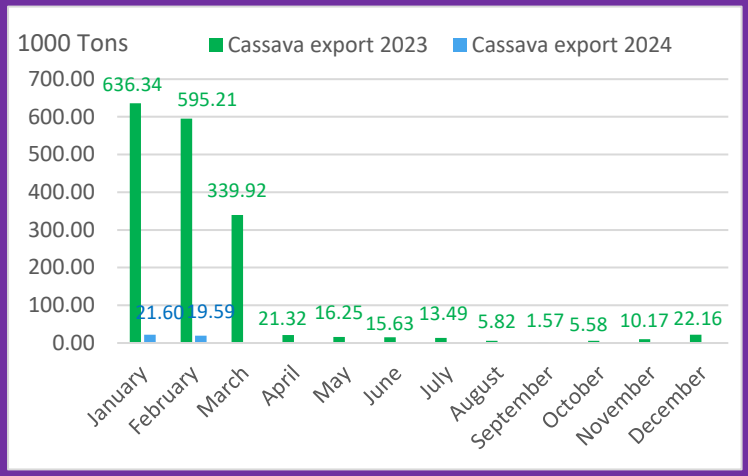

Figure 25: Monthly quantity of cassava export in 2023 - 2024

MALAYSIA

Crop Situation in 2024 (P. 1/2)

In 2024, Malaysia is expected to experience severe natural disasters, including thunderstorms, tornadoes, storms, and typhoons in various states such as Kelantan, Kedah, Perak, Pulau Pinang, Selangor, Johor, Sabah, and Sarawak. The floods have caused considerable damage across several provinces including Kelantan, Kedah, Perlis, Perak, Pahang, Melaka, Negeri Sembilan, Pulau Pinang, Johor, Terengganu, Sarawak, and Sabah. Additionally, Kelantan has faced drought conditions, further compounding the challenges in the region. The disasters may result in significant damage, including the destruction of 7,610 hectares of rice fields.

In 2024, Malaysia's agricultural sector will witness distinctive trends in imports. Import volumes for rice and cassava have increased compared in 2023, while imports of maize and sugar have declined in 2023. The Malaysian government's initiative to increase rice imports in response to a decline in local rice production to secure the country's rice supply (Figure 26). Similarly, the increase in cassava import is attributed to a supply shortfall in domestic cassava production (Figure 32). Conversely, the decrease in maize imports is expected due to factors such as increased domestic production, changing preferences in livestock feed, and fluctuating global maize prices (Figure 28). The decrease in sugar import is projected to stem from changing consumer preferences (Figure 30).

In 2024, Malaysia's agricultural sector is expected to experience distinct export trends. Maize and sugar exports are expected to increase compared to 2023, while rice and cassava exports are expected to decline in 2023. The export of maize has increased due to rising demand in foreign markets (Figure 29). Similarly, sugar export has grown due to increased international demand (Figure 31). Conversely, the decline in rice and cassava exports is primarily to meet domestic demand (Figure 27, 33).

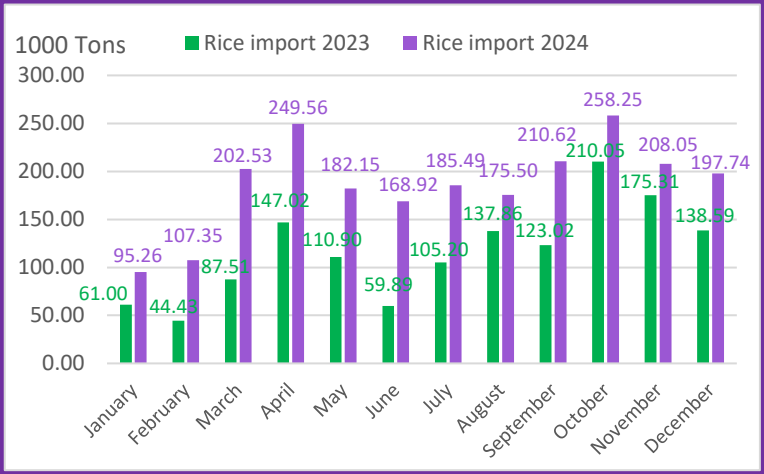

Figure 26: Monthly quantity of rice import in 2023 – 2024

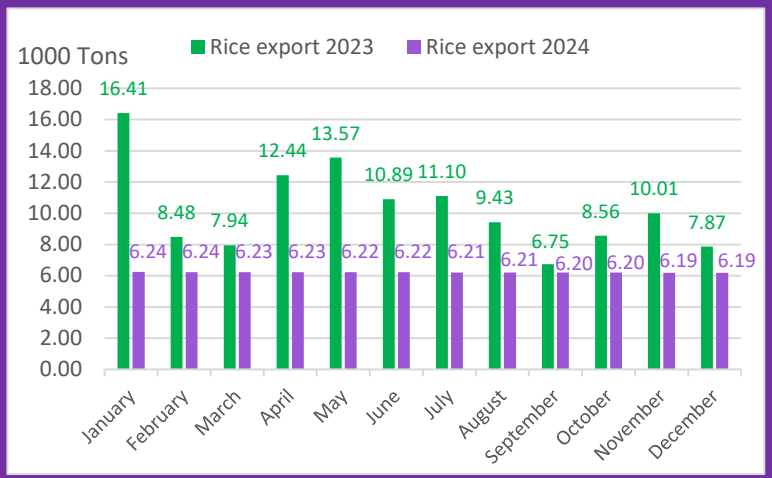

Figure 27: Monthly quantity of rice export in 2023 -2024

Crop Situation in 2024 (P. 2/2)

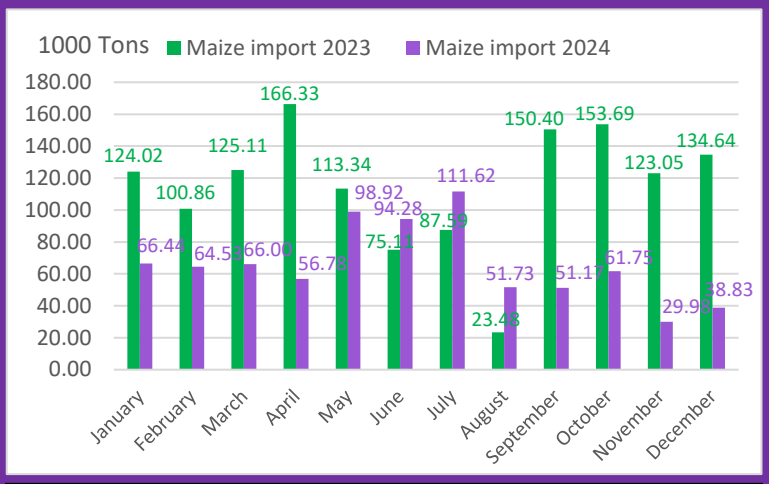

Figure 28: Monthly quantity of maize import in 2023 -2024

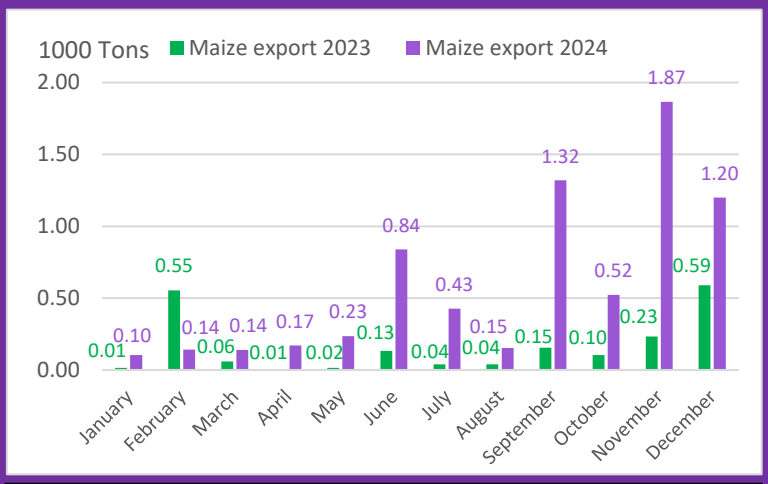

Figure 29: Monthly quantity of maize export in 2023 -2024

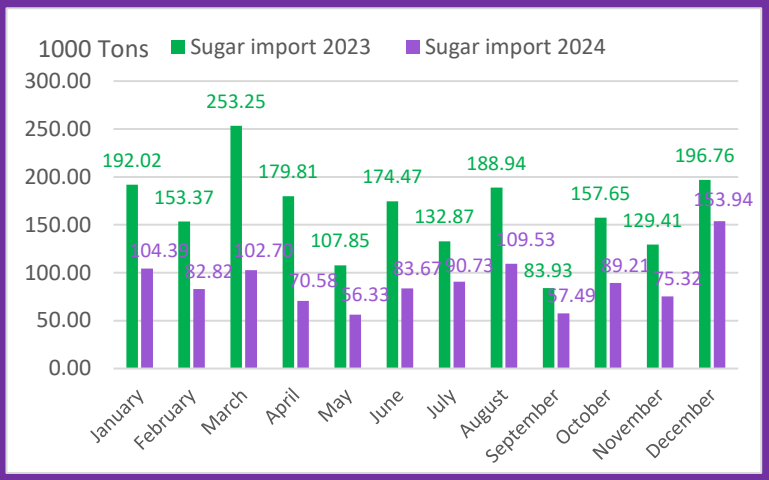

Figure 30: Monthly quantity of sugar import in 2023 -2024

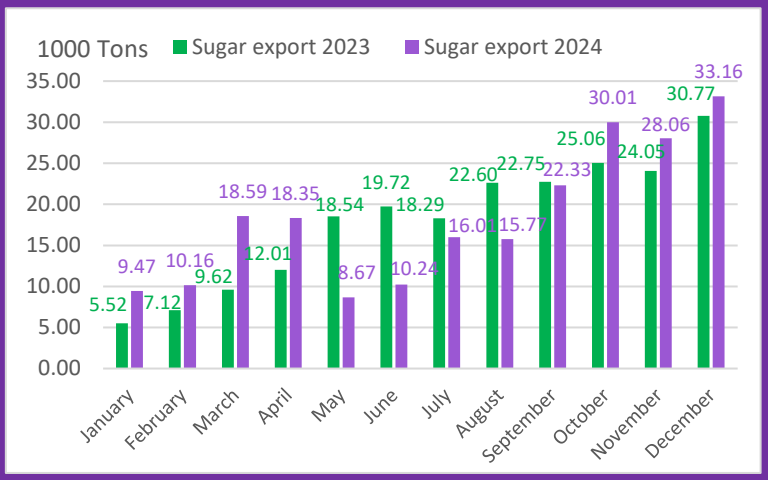

Figure 31: Monthly quantity of sugar export in 2023 -2024

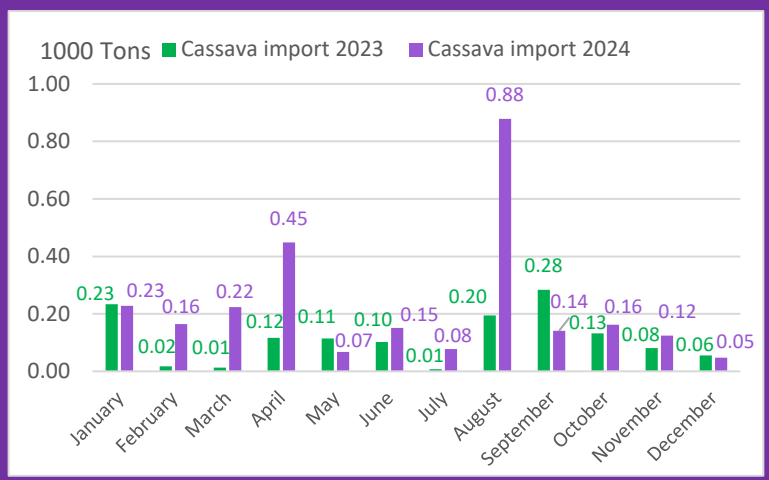

Figure 32: Monthly quantity of cassava import in 2023 -2024

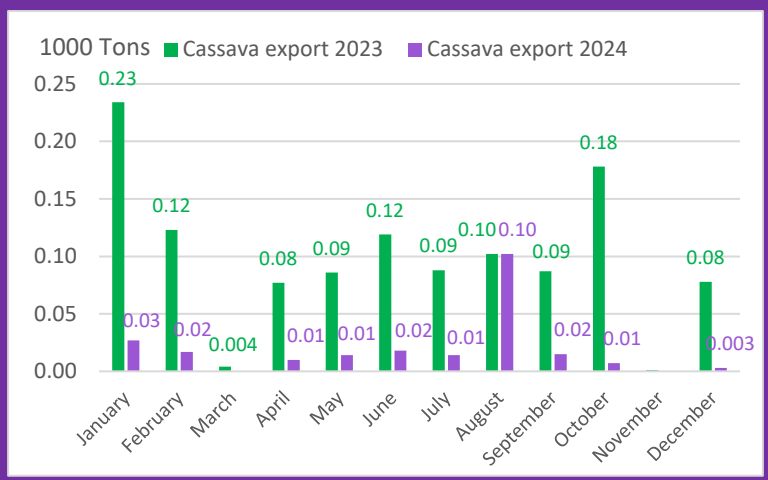

Figure 33: Monthly quantity of cassava export in 2023 -2024

Crop Situation in 2024 (P. 1/3)

Myanmar is expected to experience favorable weather conditions in 2024 (2023/2024) due to adequate irrigation and sufficient sunlight for crops. There may have low rainfall in several regions, ranging from 0.5 to 20 millimeters per day. However, the impacts of climate change and global warming are evident, with some regions experiencing hotter temperatures than usual both day and night. Despite generally favorable weather, certain regions of Myanmar may be faced with natural disasters in 2024. These include floods in Nay Pyi Taw, Kachin, Kaya, Kayin, Sagaing, Bago, Magwe, Mandalay, Mon, Rakhine, Yangon, Ayeyawaddy, and Shan. Additionally, specific disasters such as mouse infestations in Kachin, landslides in Nay Pyi Taw and Kachin, storms and typhoons in Mon, soil erosion in Rakhine, and damage caused by human activities in Shan. The damage from these disasters results in the loss of 12,950 hectares of rice, 716 hectares of maize, and 35 hectares of soybean crops.

To mitigate the effects of climate change or global warning on agriculture, farmers in Myanmar are adapting by adjusting their cultivation plans and planting times to align with changing weather patterns and using crop varieties that are resistant to climate change. The Myanmar government is supporting these efforts by providing farmers with new technologies and increasing access to credit. This includes expanding channels for farmers to access credit, which helps them invest in technologies and practices that improve resilience to climate change and enhance agricultural productivity.

For rice situation in 2024, the rice planted area is expected to increase due to the farmer responding to price increases by expanding cultivation and taking advantage of favorable weather conditions with abundant sunlight. The harvesting periods for rice are extended from August 2023 to February 2024 for the wet season and from February 2024 to August 2024 for the dry season. The situation regarding imports and exports has seen a decrease. Rice imports have decreased due to adequate domestic food security. Furthermore, rice exports have decreased as there have been fewer orders for export items and reduced rice imports (Figure 34).

Figure 34: Monthly quantity of rice export in 2023 - 2024

Crop Situation in 2024 (P. 2/3)

For maize situation in 2024, the production is expected to increase with an expansion in planted areas due to farmers' favorable response to price increases and advantageous weather conditions, marked by sufficient sunlight. Maize harvesting periods take place from August 2023 to December 2024 for the wet season and from January 2024 to June 2024 for the dry season. The situation regarding imports and exports has seen a decrease. Maize imports have decreased due to adequate domestic food security (Figure 35). Furthermore, maize exports have decreased as there have been fewer orders for export items and reduced maize imports (Figure 36).

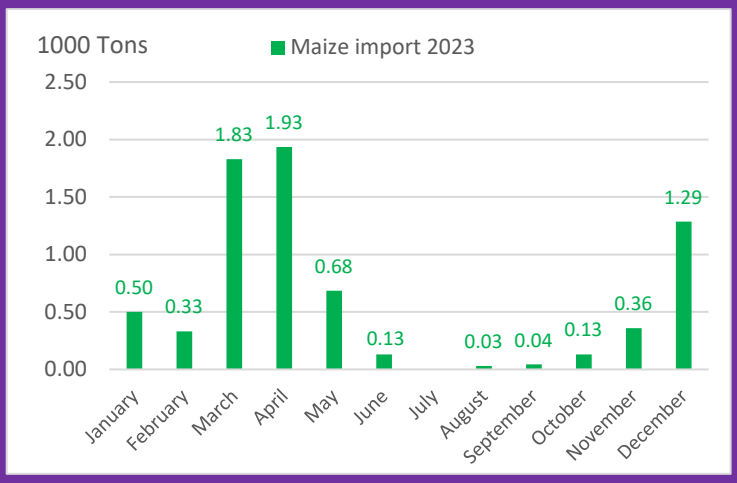

Figure 35: Monthly quantity of maize import in 2023

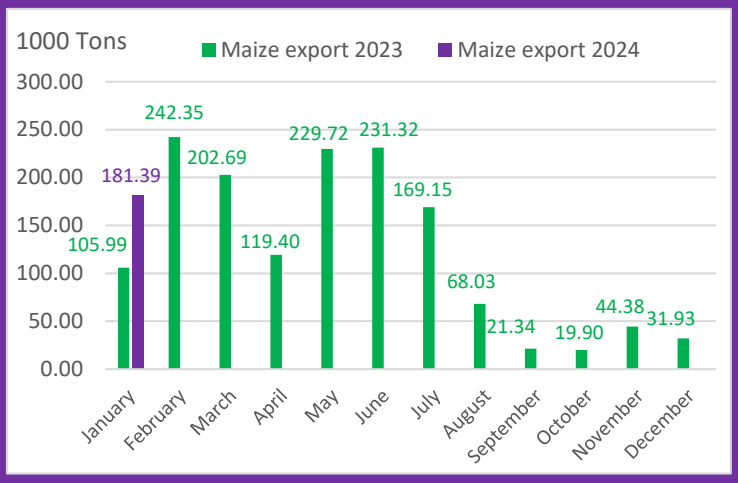

Figure 36: Monthly quantity of maize export in 2023 - 2024

For sugarcane situation in 2024, sugarcane cultivation is expected to experience growth in planted areas, driven by farmers' positive response to price increases and favorable weather conditions, including ample sunlight. The harvesting period for sugarcane stretched from October 2023 to March 2024. Additionally, sugar exports are expected to decrease due to fewer orders for export items and reduced sugar imports (Figure 37).

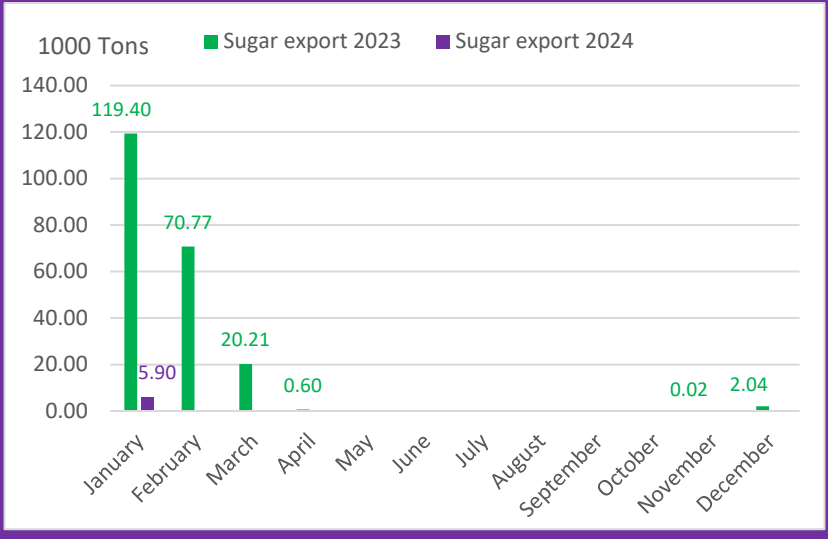

Figure 37: Monthly quantity of sugar export in 2023 - 2024

Crop Situation in 2024 (P. 3/3)

For soybean situation in 2024, the soybean planted area is expected to increase because the farmers respond to price increases by expanding cultivation and taking advantage of favorable weather conditions with abundant sunlight. The harvesting periods for soybeans span from August 2023 to January 2024 for the wet season and from December 2023 to May 2024 for the dry season. The situation regarding imports and exports has seen an increase. Soybean imports have increased due to high demand for domestic food security (Figure 38). Additionally, soybean exports have increased due to higher production levels (Figure 39).

For cassava situation in 2024, the production is expected to increase with a rise in planted areas due to farmers' responsiveness to price increases and the presence of favorable weather conditions, characterized by ample sunlight. The harvesting period for cassava is between September 2023 and June 2024. The situation regarding imports and exports has seen an increase. Cassava imports have increased due to high demand for domestic food security (Figure 40). Additionally, cassava exports have increased due to higher production levels (Figure 41).

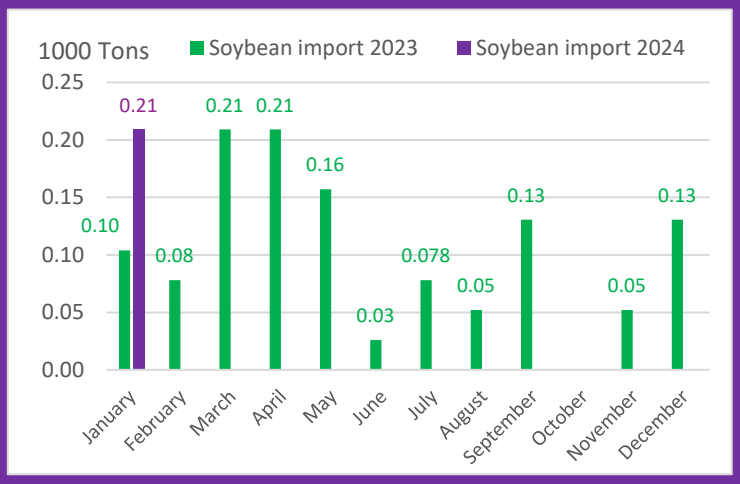

Figure 38: Monthly quantity of soybean import in 2023 - 2024

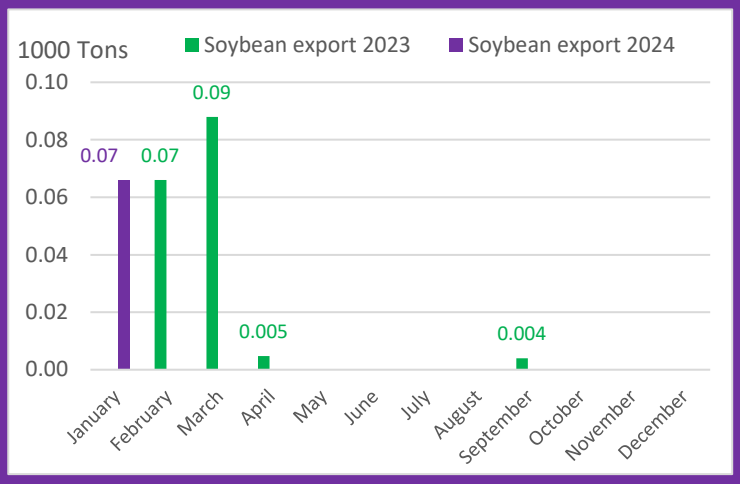

Figure 39: Monthly quantity of soybean export in 2023 - 2024

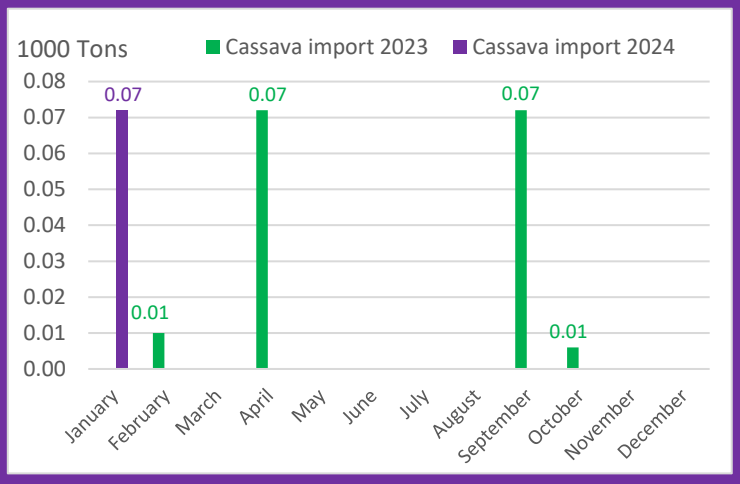

Figure 40: Monthly quantity of cassava import in 2023 - 2024

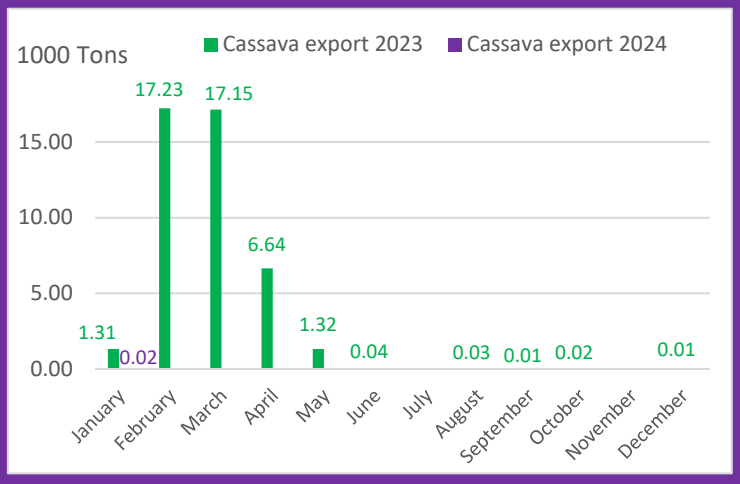

Figure 41: Monthly quantity of cassava export in 2023 - 2024

Crop Situation in 2024 (P.1/3)

In 2024 (2023/24), Strong and mature El Niño is expected to continue until March to May 2024 season. Majority of climate models suggest a transition to ENSO neutral conditions during the April to June 2024 season. There is currently no information on the impacts of climate change and global warming, or natural disasters in 2024 because it is still early in the year, and the relevant agriculture department has not yet started to estimate the data.

For rice in 2024, the production of rice in the Philippines maybe poor to fair as most parts of the country experienced dry spell to drought condition. The lower rainfall condition and higher temperature is expected to persist until May 2024, however, there is likelihood for La Niña to develop during the June to August 2024 season. To address the effects of El Niño, the Department of Agriculture provided interventions thru support to production financial and livelihood assistance and water management. The harvesting periods for rice in 2024 are from July 2023 to December 2023 for the wet season and from January 2024 to June 2024 for the dry season. The trend for rice imports in January 2024 is higher than in 2023, while the trend for rice exports in 2023 was inconsistent (Figure 42-43).

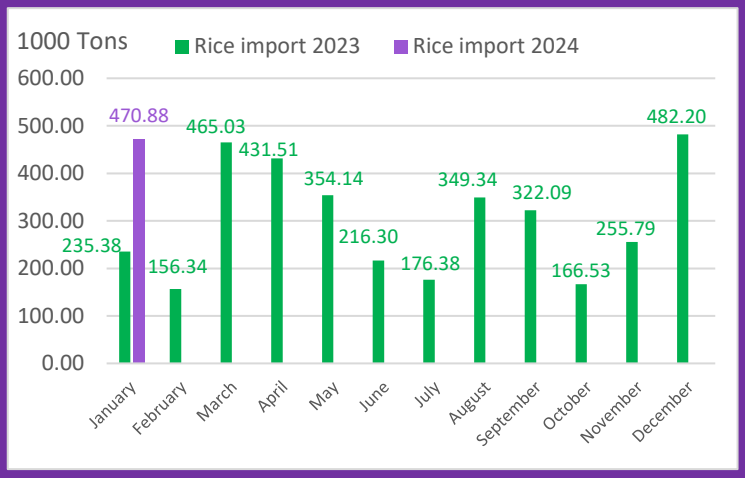

Figure 42: Monthly quantity of rice import in 2023 - 2024

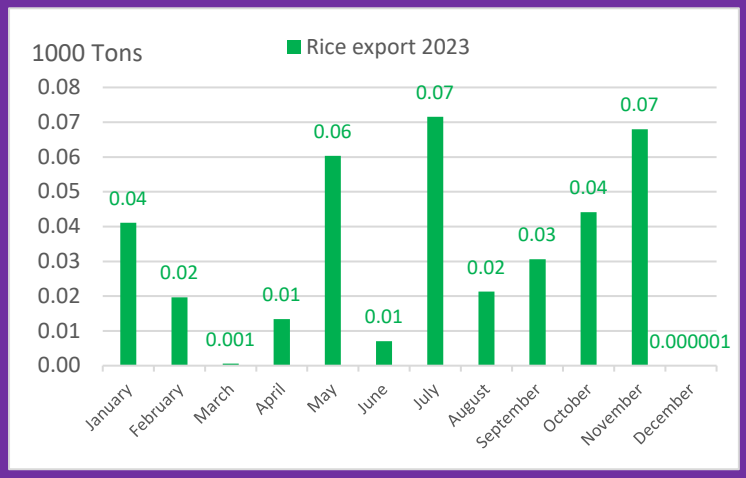

Figure 43: Monthly quantity of rice export in 2023

For soybean in 2024, the available data is from July to December 2023, which is still preliminary. However, as a matter of policy, the PSA does not forecast data on production. The harvesting period for soybean in 2023 was from July 2023 to December 2023. The trend for soybean imports in January 2024 decreased compared to January 2023 (Figure 44).

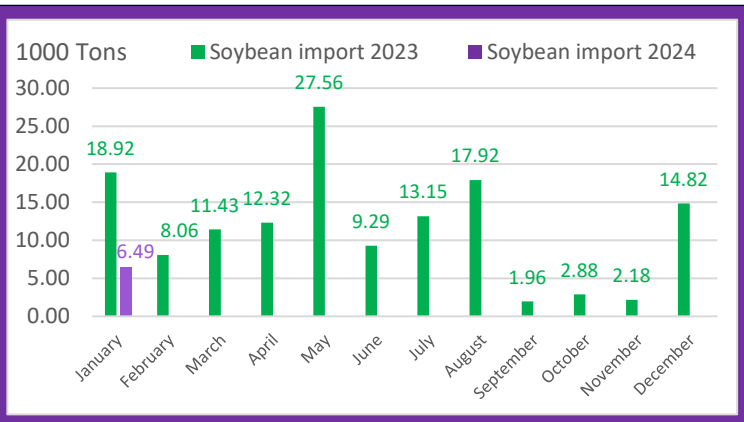

Figure 44: Monthly quantity of soybean import in 2023 - 2024

Crop Situation in 2024 (P.2/3)

For maize in 2024, the data on the area planted was not available, only data on the harvested area officially released. The production is estimated to decrease due to unfavorable weather conditions, specifically the impact of Typhoon Egay during the flowering stage. Additionally, some corn farmers shifted to sugarcane, bananas, and vegetables due to the high cost of inputs. The harvesting periods for maize in 2024 are from July 2023 to December 2023 for the wet season and from January 2024 to June 2024 for the dry season. The trend for maize imports in January 2024 is lower than in 2023, while the trend for maize exports in January 2024 is higher than in 2023 (Figure 45-46).

For cassava in 2024, the available data is from July to December 2023, which is still preliminary. However, as a matter of policy, the PSA does not forecast data on production. The harvesting period for cassava in 2023 was from July 2023 to December 2023 for the first crop. The trend for cassava imports and exports in January 2024 increased compared to January 2023 (Figure 47-48).

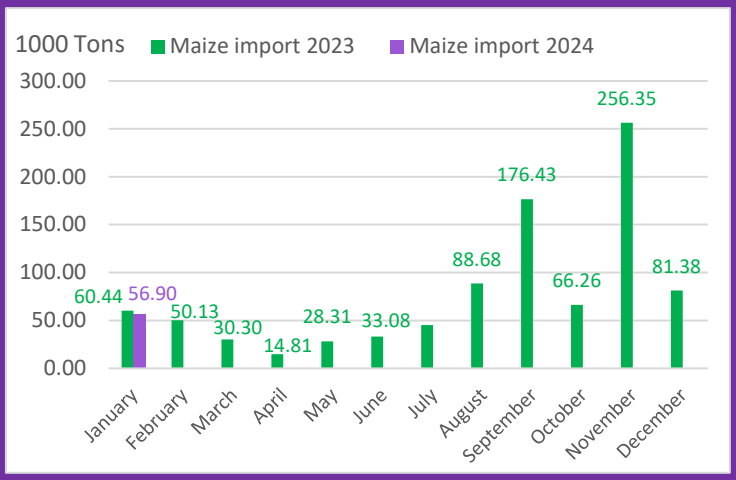

Figure 45: Monthly quantity of maize import in 2023 - 2024

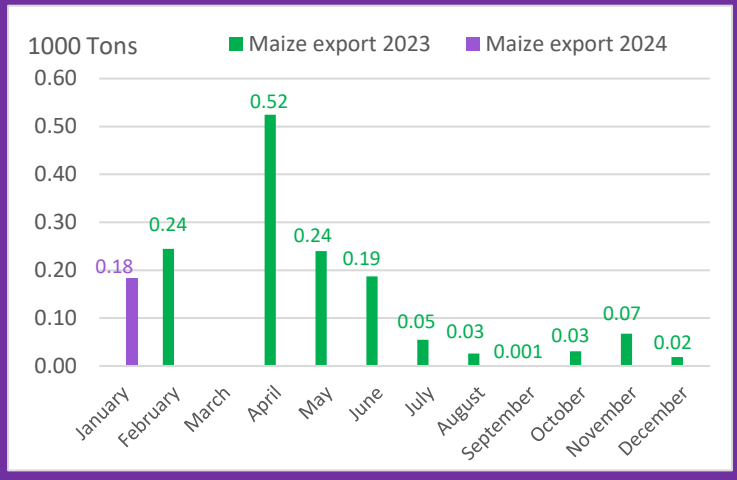

Figure 46: Monthly quantity of maize export in 2023 - 2024

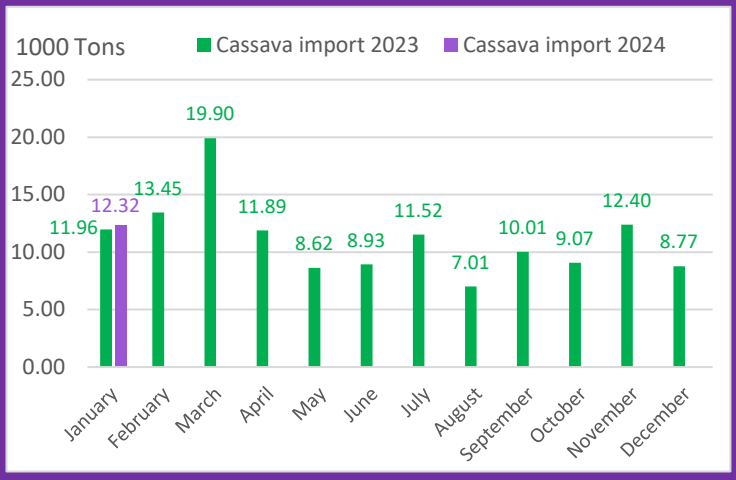

Figure 47: Monthly quantity of cassava import in 2023 - 2024

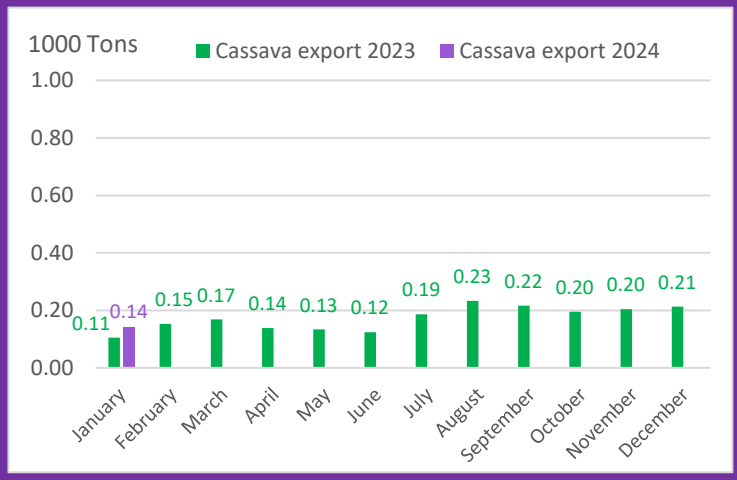

Figure 48: Monthly quantity of cassava export in 2023 - 2024

Crop Situation in 2024 (P.3/3)

For sugarcane in 2024, data on the area planted is not available for the crop year 2023/2024. The available data is from October to December 2023, which is still preliminary. However, as a matter of policy, the PSA does not forecast data on production. For the Crop Year 2023/2024 production of raw sugar is estimated to be 1.85 million metric tons. The Sugar Regulatory Administration (SRA) anticipates an increase in domestic demand for sugar due to the continuous easing of restrictions brought by the pandemic. Additionally, the anticipated El Niño phenomenon is also considered to affect the production estimates for the year. The harvesting period for sugarcane in 2024 is from September 2023 to August 2024. The raw sugar imports in 2023 is only available from June to August (Figure 49-50).

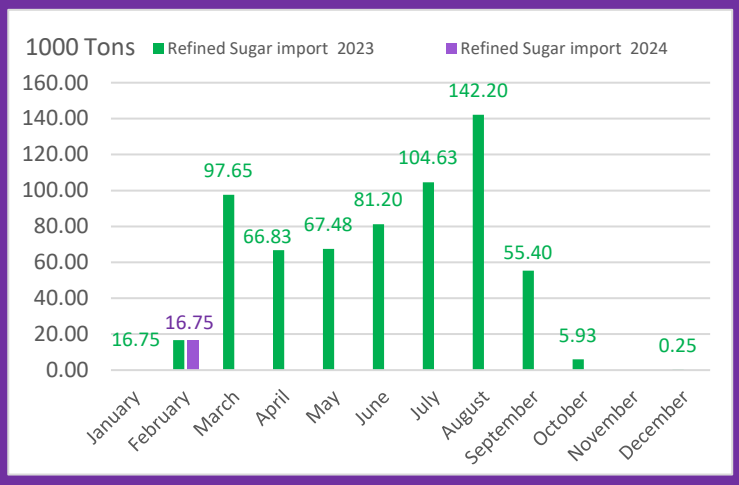

Figure 49: Monthly quantity of refine sugar import in 2023 - 2024

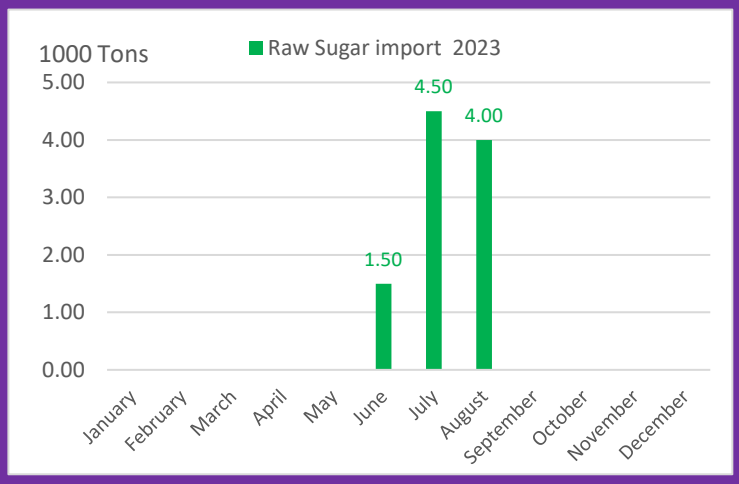

Figure 50: Monthly quantity of raw sugar import in 2023

THAILAND

Crop Situation in 2024 (P.1/4)

The weather in Thailand in 2024 (2023/2024) is forecast to experience significantly drier and hotter weather compared to previous years. The temperatures have reached highs of 35-39 degrees Celsius. The rainfall has been insufficient, ranging from 0.5 to 20 millimeters per day, which is much lower than usual. The impact of global warming has led to the extreme drought of 2023, likely influenced by El Niño. The combination of higher temperatures, delayed monsoon rains, and below-average precipitation has resulted in water shortages and widespread drought across all regions of Thailand, negatively impacting agricultural production. Moreover, flooding has become a significant issue in the Northern, Central, Northeastern, and Southern parts of Thailand, affecting 60 provinces. Additionally, there have been reports of crop diseases, particularly cassava mosaic disease, in the Northern, Central, and Northeastern regions, impacting 30 provinces. The total affected area four commodities are 560,000 hectares for rice, 14,000 hectares for maize, 18 hectares for soybeans, and 5,000 hectares for cassava.

Farmers in regions affected by El Niño have taken steps to reduce the risks and damages caused by natural disasters. They are preparing by using underground water sources or pumping water from nearby sources while waiting for rainfall. In addition, a number of farmers were constructing earthen dams to conserve water for later use. The government also supports farmers by advising against second-crop farming and encouraging them to cultivate crops that require less water.

For rice in 2024, the planted area is forecasted to decrease due to drought and flooding, leading to a reduction in rice production. The harvesting period for rice in 2024 is forecasted to be from August 2023 to April 2024 for the wet season and from February 2024 to October 2024 for the dry season. Additionally, rice exports are forecasted to decrease due to the reduction in production in Thailand (Figure 51-52).

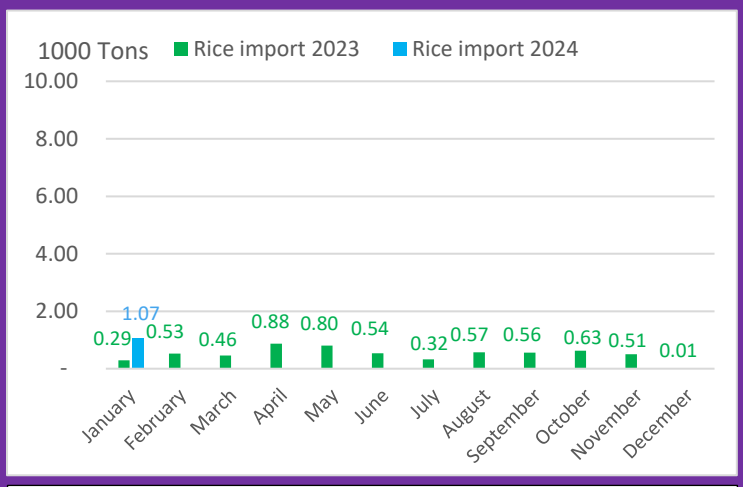

Figure 51: Monthly quantity of rice import in 2023 - 2024

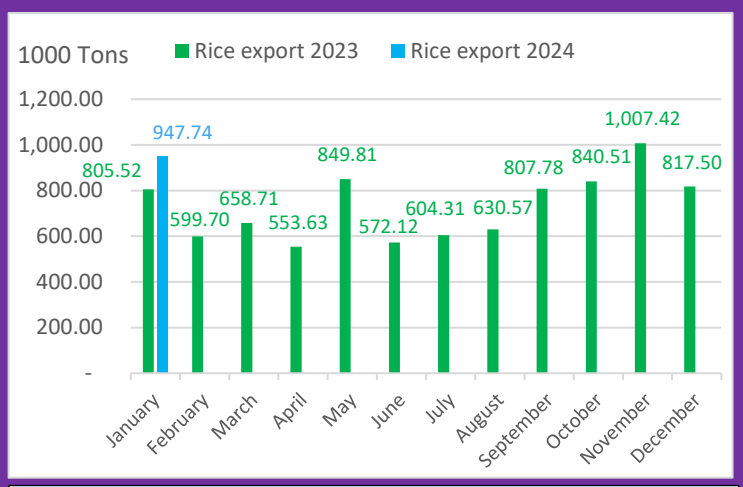

Figure 52: Monthly quantity of rice export in 2023 - 2024

THAILAND

Crop Situation in 2024 (P.2/4)

For maize in 2024, maize situation is forecasted to increase in maize cultivation, both in terms of planted areas and production. This increase is due to farmers responding to higher prices and the lingering effects of the El Niño phenomenon in 2023, which made it hard to grow rice. Consequently, many farmers have switched to cultivating dry-season corn, a crop that requires less water. The increasing production can also be attributed to the weakening El Niño conditions, which are anticipated to normalize between April and June, bringing increased rainfall and relieving the drought conditions from the previous year. The maize harvest in 2024 is from June 2024 to February 2025 for the wet season and from February 2024 to May 2024 for the dry season. Despite these positive trends mentioned, both imports and exports of maize have decreased. The decreasing in imports is due to the high cost of maize for animal feed, prompting the import of alternative raw materials like wheat, barley, and DDGS (corn residue from ethanol production) (Figure 53). Likewise, exports have decreased as local production falls short of meeting the rising demand in the animal feed sector, which has also surged domestically (Figure 54).

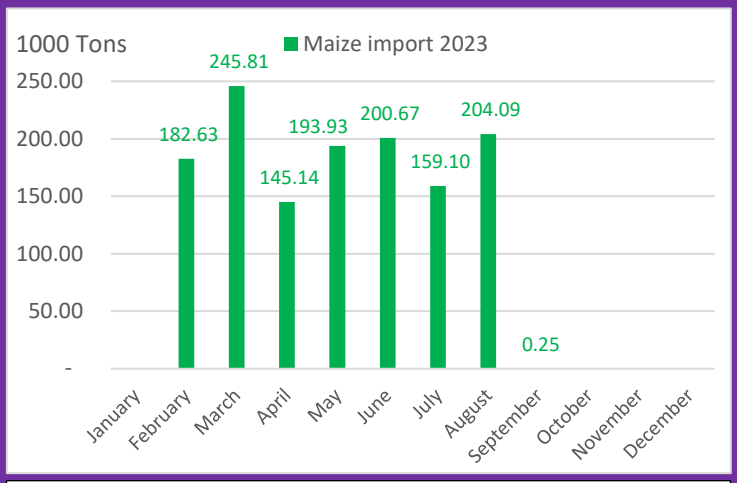

Figure 53: Monthly quantity of maize import in 2023

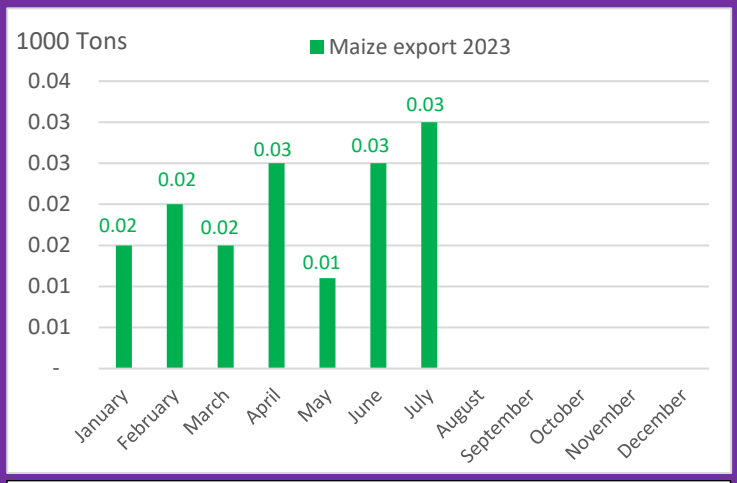

Figure 54: Monthly quantity of maize export in 2023

For sugarcane in 2024, sugarcane situation is forecasted to decrease in both planted area and production. The decrease in planted area is a result of farmers switching to cultivating rice and cassava. Additionally, high production costs, including expenses for fertilizer and harvest, contribute to a decrease in planted areas. Moreover, the impact of the drought in the previous year also leads to low production levels, further diminishing returns for farmers. The production decrease can be attributed to the lingering effects of the drought. The sugarcane harvesting in 2024 is from December 2024 to April 2025. On the other hand, both imports and exports of sugar have increased. The increase in imports is driven by higher domestic demand, supported by the gradual recovery of the tourism industry and the expansion of continuous industries (Figure 55). On the export side, the increase is fueled by higher domestic production and the growing demand for sugar in Southeast Asia (Figure 56).

Crop Situation in 2024 (P.3/4)

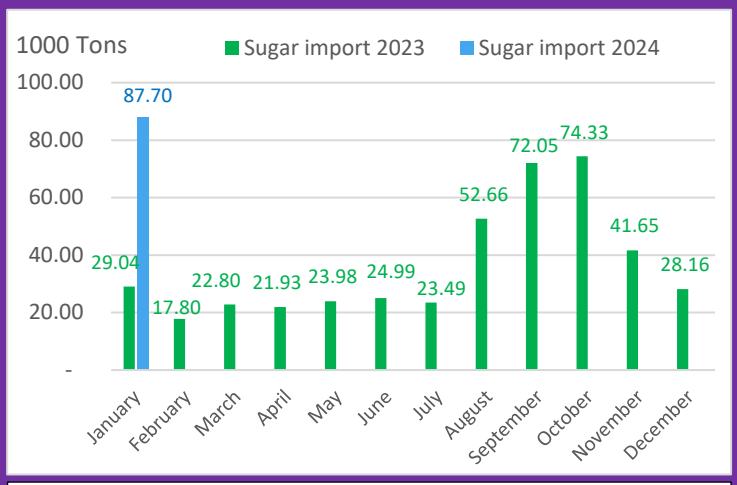

Figure 55: Monthly quantity of sugar import in 2023 - 2024

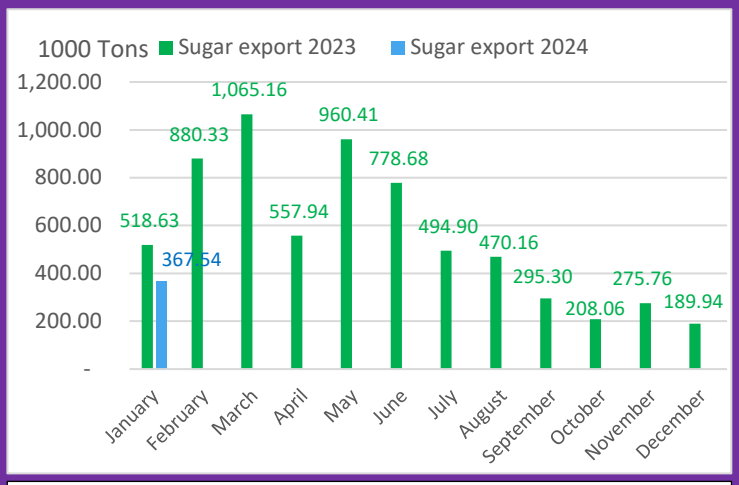

Figure 56: Monthly quantity of sugar export in 2023 - 2024

For soybeans in 2024, soybean situation is forecasted to different trends. The planted area decreases due to soybeans being a difficult crop to care for, a shortage of seeds, insufficient labor for harvesting, and low returns, which discourage farmers from planting as much. However, soybean production increases as some farmers switch to planting rice and cassava instead. The soybean harvesting period in 2024 is from July 2024 to December 2024 for the wet season and from January 2024 to May 2024 for the dry season. In terms of imports and exports, soybean imports increase due to entrepreneurs importing to meet the rising domestic demand, as there is insufficient soybean supply in the country (Figure 57). Additionally, the price of soybeans abroad decreases, further incentivizing imports, but soybean exports decrease because there aren't enough soybeans to meet domestic demand (Figure 58).

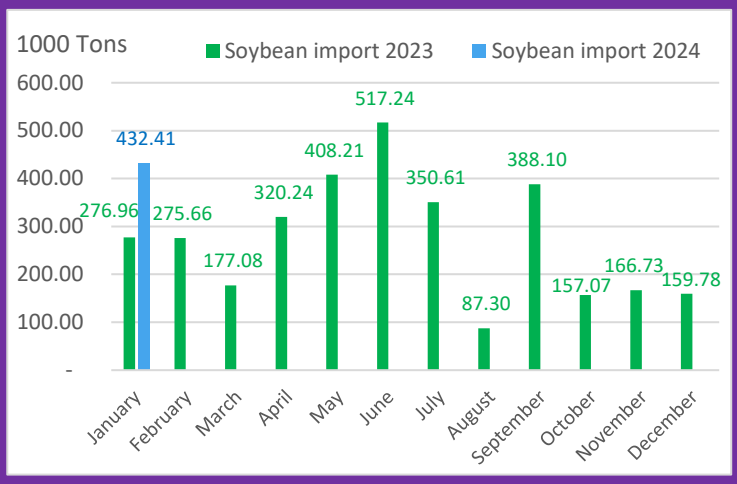

Figure 57: Monthly quantity of soybean import in 2023 - 2024

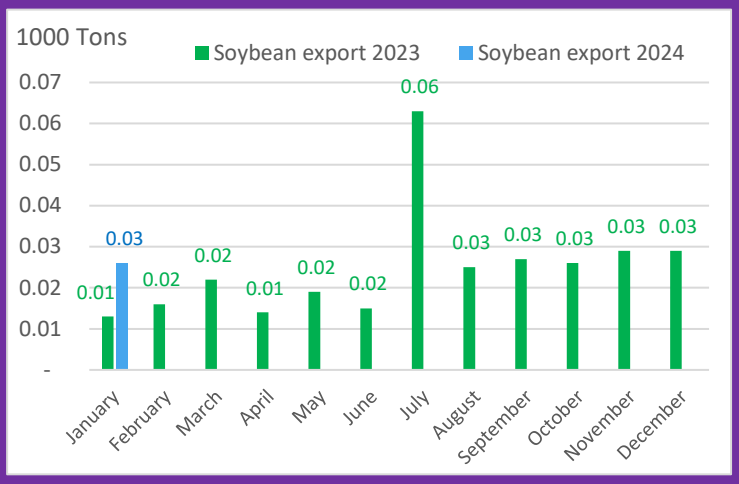

Figure 58: Monthly quantity of soybean export in 2023 - 2024

THAILAND

Crop Situation in 2024 (P.4/4)

For cassava in 2024, cassava situation is forecasted to decrease in both the planted area and the production of cassava. The decrease in planted area is due to a shortage of cassava stem cuttings for planting. Production declines as a result of diseases and pests, particularly cassava mosaic disease, as well as drought conditions. The harvesting period for cassava in 2024 is from October 2024 to September 2024. Both imports and exports of cassava have decreased. The decrease in imports is because the government has implemented strict measures to ensure the quality of imported cassava chips, aiming to stabilize domestic prices (Figure 59). The decline in exports is attributed to issues such as flooding, drought, and insufficient rainfall in 2023, which led to inadequate production to meet market demand (Figure 60).

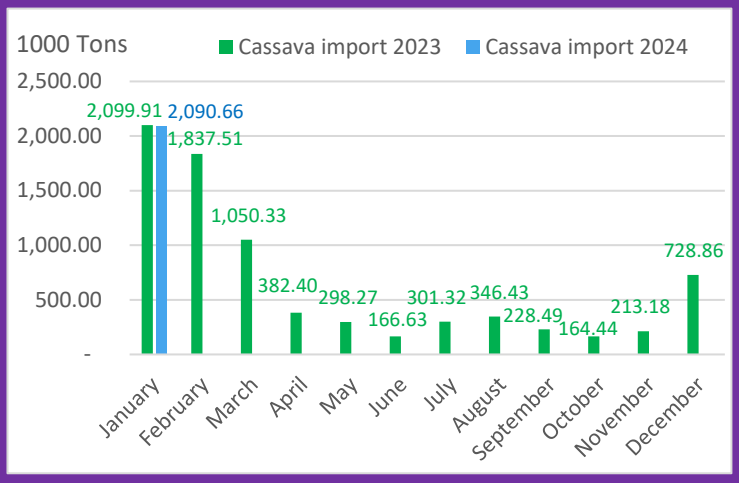

Figure 59: Monthly quantity of cassava import in 2023 - 2024

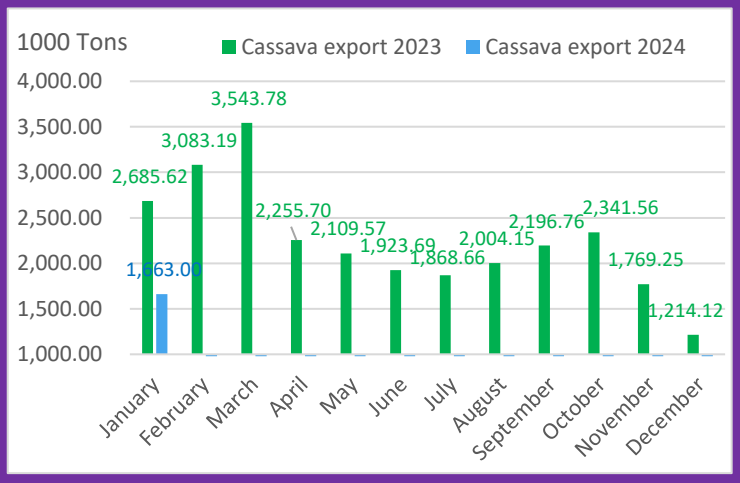

Figure 60: Monthly quantity of cassava export in 2023 - 2024

Vietnam

Crop Situation in 2024 (P.1/4)

The weather condition, impact of climate change or global warming on agricultural commodities production, and trade of Vietnam in 2024. In the first three months of 2024, Northern Vietnam experienced relatively favorable weather conditions for agricultural production. However, Southern Vietnam faced challenges, with agricultural crops affected by heat and saltwater intrusion. This intrusion impacted over 29 thousand hectares of rice in the late winter-spring crop in the South. During this period, the prices of imported fertilizers decreased by 17.5% compared to the same period in 2023. Despite this, Vietnam's agricultural sector saw a significant increase in export value, estimated at 21.8%. This increase was driven by higher exports to key markets such as China, the U.S., and Japan. Similarly, the import value of the agricultural sector is estimated to have risen by 8.2%, primarily due to increased imports from Brazil, China, and the U.S.

For Rice in Vietnam on 2024, Vietnam's dry rice production is expected to be decrease than in 2023 due to the impact of saltwater intrusion in the Mekong Delta region. This environmental factor has posed significant challenges to rice cultivation in the area. Regarding trade, prices of rice in both domestic and international markets have continuously decreased in the first 3 months of 2024, which may affect total Vietnam's rice exports in 2024 (Figure 61-62).

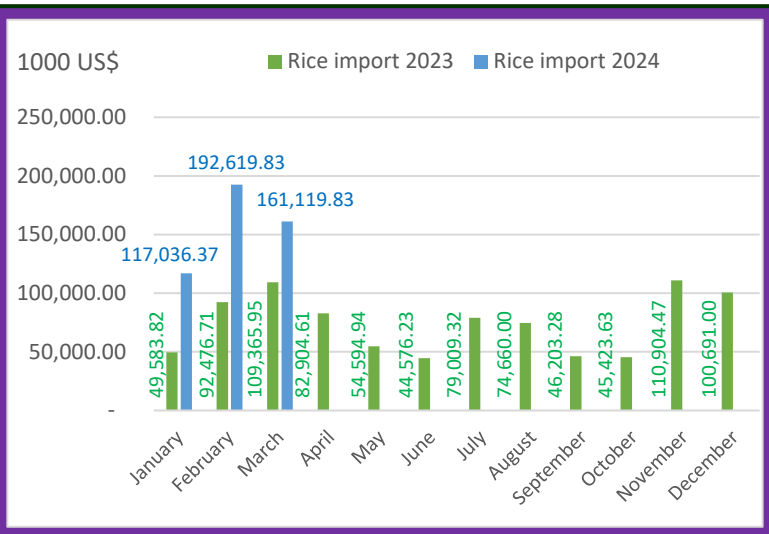

Figure 61: Monthly value of rice import in 2023 – 2024

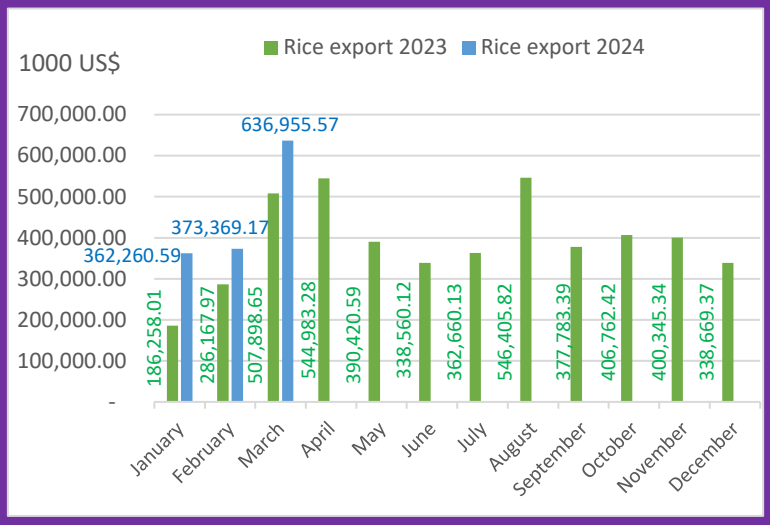

Figure 62: Monthly value of rice export in 2023 – 2024

Vietnam

Crop Situation in 2024 (P.2/4)

Maize and soybean in Vietnam on 2024, In the 2024 winter-spring crop, the planted areas for maize and soybean are expected to decrease compared to the previous year. The prices of imported fertilizers dropped by 17.5% in the first three months of 2024 compared to the same period in 2023. This decline in fertilizer prices led to a reduction in production costs for various agricultural commodities, including maize and soybean. Despite the decrease in planted areas, the import volume of maize and soybean increased in the first three months of 2024. The import volume of maize reached 2.87 million tons, a 31.3% increase, while the import value decreased by 2.1% to 723 million USD (Figure 63-64). Similarly, the import volume of soybean increased by 10.1% to 549 thousand tons, with the import value decreasing by 12.1% to 305 million USD (Figure 65-66).

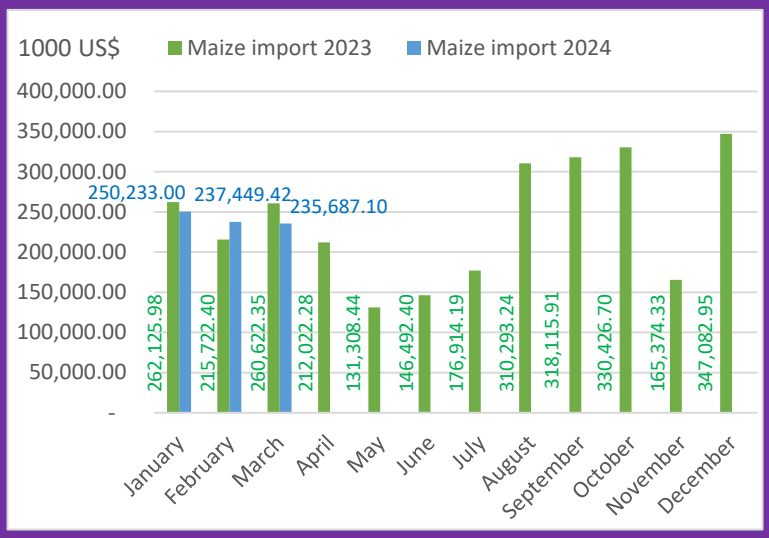

Figure 63: Monthly value of maize import in 2023 – 2024

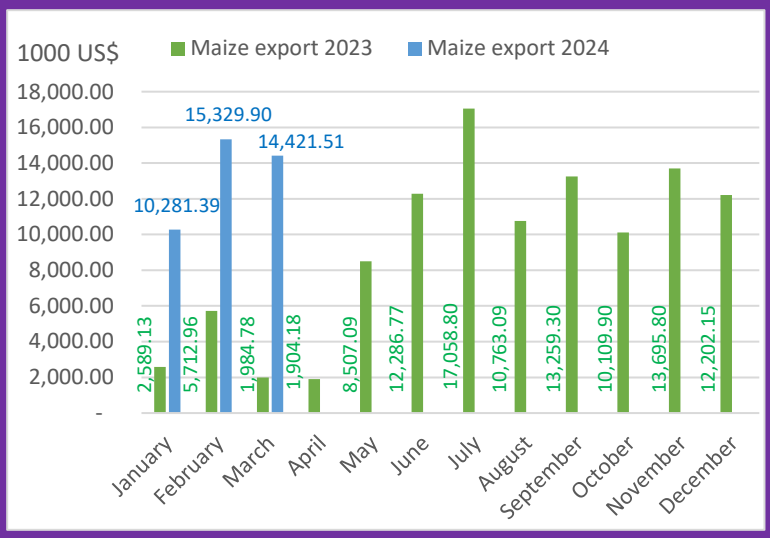

Figure 64: Monthly value of maize export in 2023 – 2024

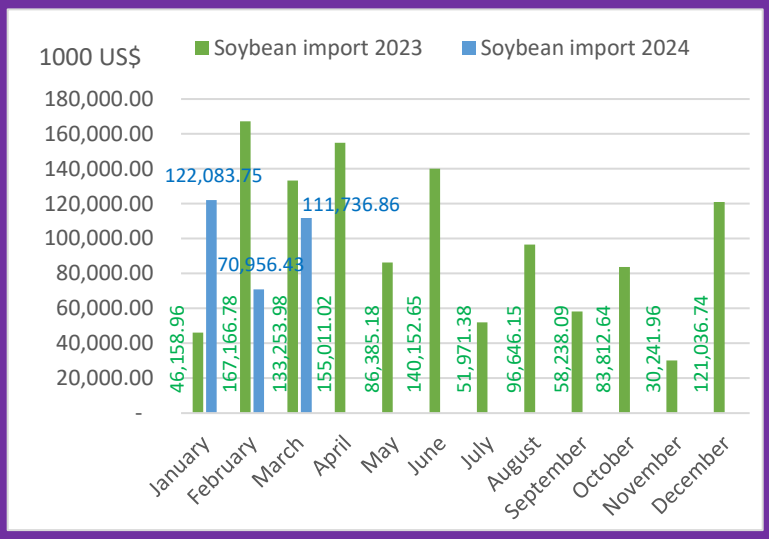

Figure 65: Monthly value of soybean import in 2023 – 2024

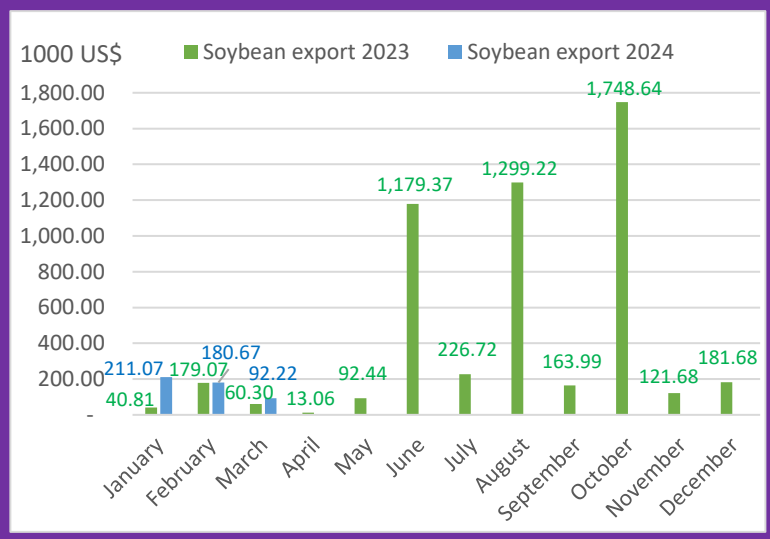

Figure 66: Monthly value of soybean export in 2023 – 2024

Vietnam

Crop Situation in 2024 (P.3/4)

Sugarcane in Vietnam on 2024, the sugarcane sector experienced a decrease in both planted area and production. This reduction in planted area was a result of farmers switching to cultivating rice and cassava. Additionally, high production costs, including expenses for fertilizers and harvest, contributed to this decline. The impact of drought in the previous year also led to low production levels, further diminishing returns for farmers. The production decrease in 2024 can be attributed to the lingering effects of drought. Despite these challenges, both imports and exports in sugar have increased (Figure 67-68). The rise in imports is driven by a higher domestic demand, supported by the gradual recovery of the tourism industry and the expansion of continuous industries. On the export side, the increase is fueled by higher domestic production and the growing demand for sugar in Southeast Asia.

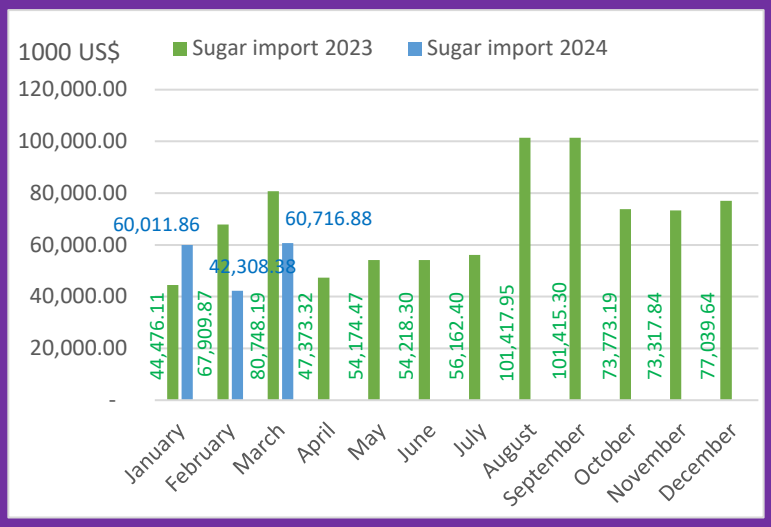

Figure 67: Monthly value of sugar import in 2023 – 2024

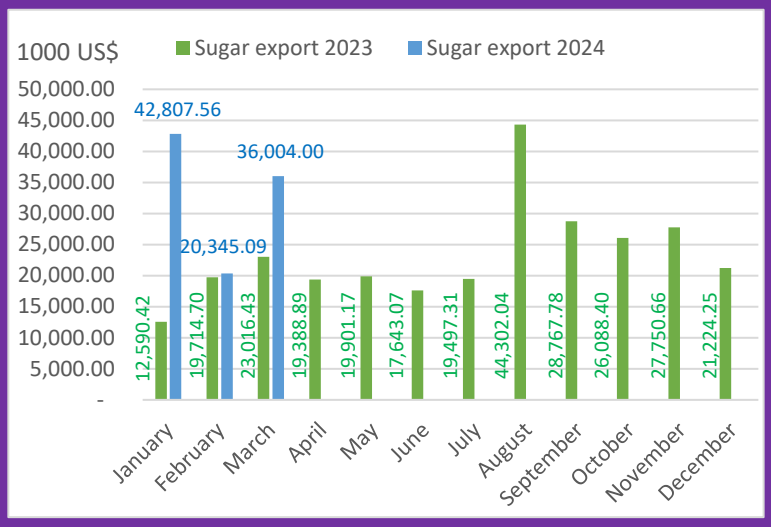

Figure 68: Monthly value of sugar export in 2023 – 2024

Vietnam

Crop Situation in 2024 (P.4/4)

Cassava in Vietnam on 2024, the price of cassava chips and cassava starch in Vietnam is following an upward trend due to the increase in the price of fresh cassava roots. In the first three months of 2024, the export value of Vietnam's cassava is estimated to increase by 21.1% compared to the same period in 2023, mostly due to an increase in cassava exports to China (Figure 70). Meanwhile, Vietnam's import value of cassava during the first three months of 2024 is estimated to increase considerably by 57.1%, mostly as a result of a rise in cassava imports from Laos (Figure 69).

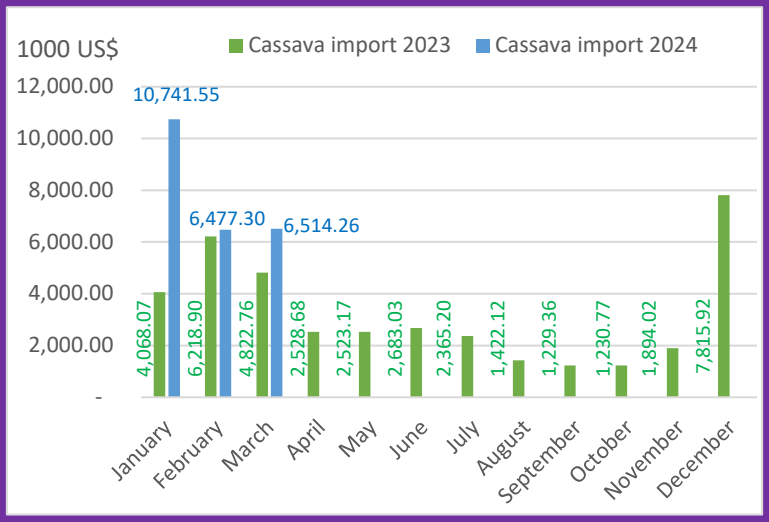

Figure 69: Monthly value of cassava import in 2023 – 2024

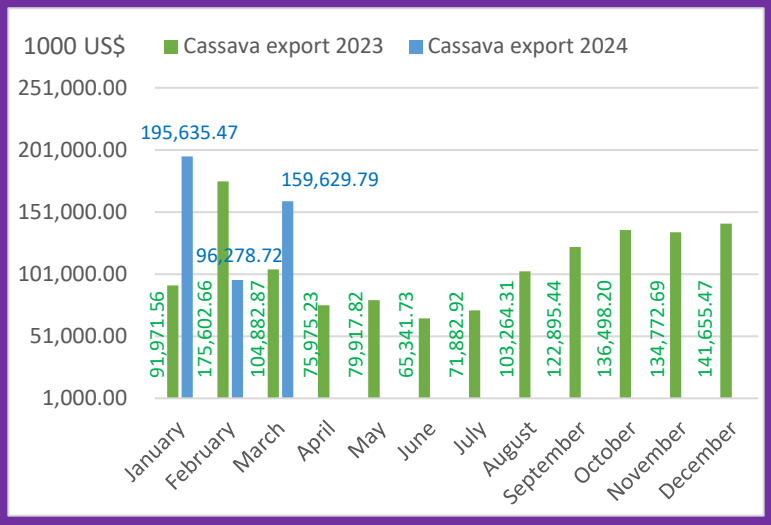

Figure 70: Monthly value of cassava export in 2023 – 2024