RICE GROWING OUTLOOK REPORT

DECEMBER 2023

Rice Growing Outlook Report

December, 2023

Overview

In the Northern side of SE-Asia, the harvesting of wet season rice has almost completed in all countries and regions. This season's weather was dry trend in the early growing season, but there was adequate rainfall in the late growing season. As a result, the yield of wet season rice is expected to be almost fair to good, except in Thailand which was severely affected by drought during June to August and flood damage in September to October. The dry season rice is in seeding stage to early growing stage under favorable growing conditions.

In the Southern side of SE-Asia, the harvesting of dry season rice will be completed this December. The total harvested area of dry season rice decreased than last year, but the yield condition is expected to be better than last dry season due to sufficient sunshine during the growing season. On the other hand, the progress of wet season rice planting is trend to delay due to less rainfall.

Brunei

In Brunei, the planting of wet season rice is almost completed and majority of the paddy plants is in the Young Panicle Forming Stage to the Flowering stage. The current growing condition of wet season rice is fair even though precipitation is significantly lower than the normal year.

Cambodia

The dry season is in tillering to young panicle stage and the planting has reached 78 percent of national plan. The current growing condition is good under favorable weather condition with enough sunshine.

It expects that the growing condition of this dry season rice is good and the final yield increases.

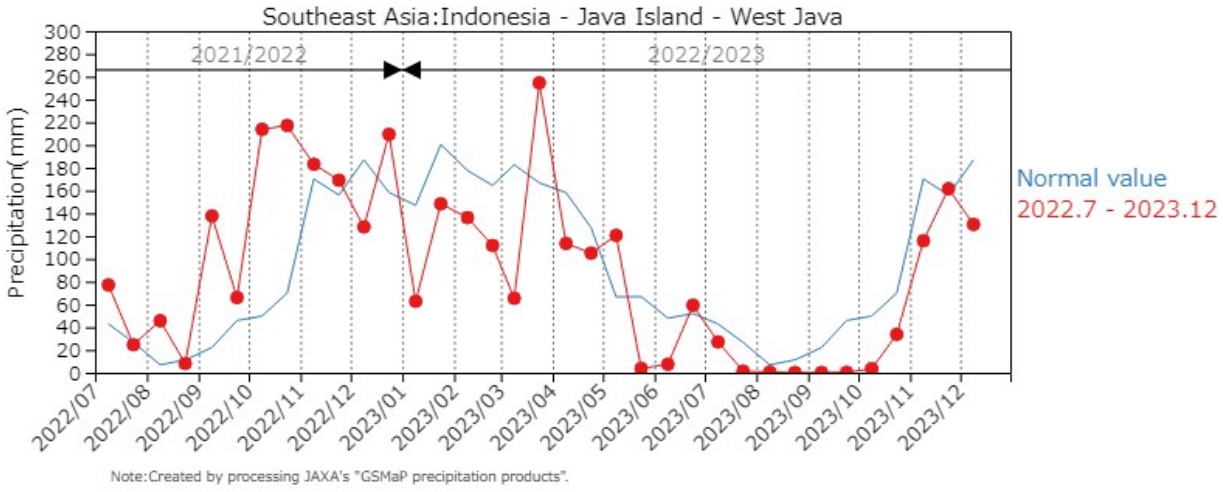
Early dry season rice growth in Cambodia

Indonesia

The dry season rice harvest will be completed this December. So far, the total area of dry season rice harvest is 4.0 million hectares, which is 6.9% lower than last year. Yield condition is expected to be better than last dry season due to sufficient sunshine during the growing season.

This December is the third month of wet season rice planting. The current planting area of wet season rice is 2.9 million hectares, 9.1% lower than last season. The rainfall is still uneven and farmers are still waiting for the right time to plant. However, water shortage due to drought is recovering, especially in the eastern part of Java and some other areas with intensive rainfall from early November to mid-December.

Although rainfall is reported to have intensified in almost all parts of Indonesia, it has not caused significant damage to rice plants.



JASMAI Precipitation Graph (West Java)

Laos

The wet season of lowland rice is at the end of harvesting stage under the good condition. The final harvested area is estimated around 796 thousand hectares with the 4.4 ton/ha yield expected and the total production is expected to be 3.5 million tons.

On the other hand, the harvesting of upland rice is nearly completed. The harvested area is around 100 thousand hectares and forecasted the 205 thousand tons final production, slightly increase comparing with last year.

The national planting plan of dry season rice in 2023-2024 is approximately 98 thousand ha and it's under field preparation stage.

Malaysia

This December is the fifth month of planting for the wet season rice. The planting progress is approximately 65 per cent which is slower than normal year. It experienced sporadic weather events, including localized heavy rainfall in some areas in September, October and November, which led to damages by about 5800 hectares and to concerns about impact on rice crops.

Myanmar

Harvesting wet season rice reached 3.65 million hectares accounting for about 60% of the planted area of 6.07 million hectares. Progress of the harvesting work is similar to last year. It produced 15.27 million tons of paddy with a yield 4.18 tons per hectare. The yield is good and higher than last year. The current weather is not interrupting the harvesting work progress.

For dry season rice, the national plan is set as 1.05 million hectares country-wide. About 95 thousand hectares of dry season rice has been planted mainly in the delta area. Planting work progress is similar to last year. It is suggested that the current weather may favor the dry season rice.

Philippines

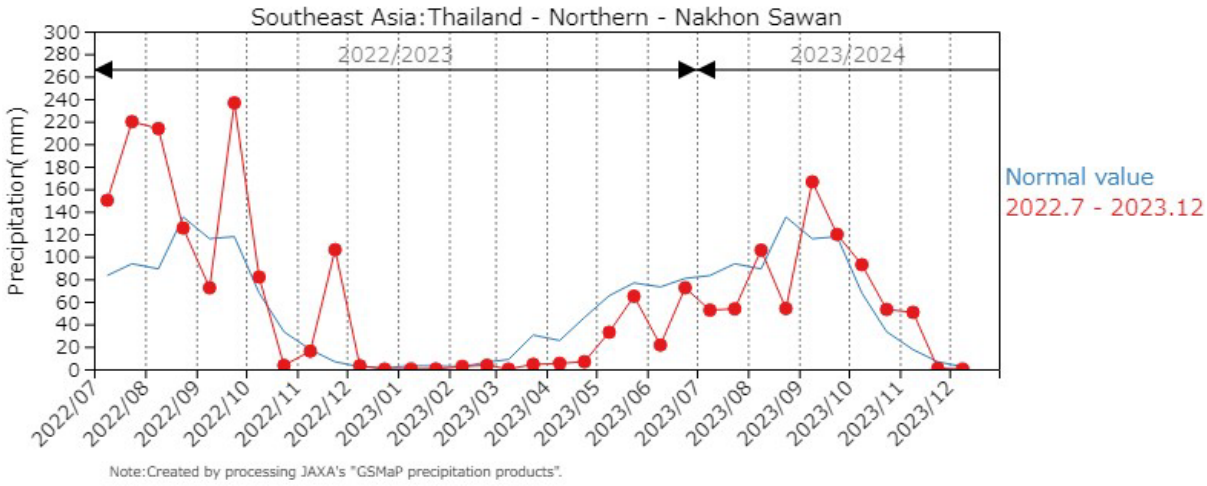
The final wet season rice production may be higher than the actual harvest in the same period of the previous year due to sufficient amount of rainfall during reproductive stage and continued government support programs.

For now, the dry season rice planted in November to December is in the seeding period. Below normal rainfall conditions are more likely to experience in most parts of the country for the remainder of the month.

Thailand

The harvesting of wet season rice has been completed this month. The total harvested area decreased about 1.8% than last year because of insufficient water for rice cultivation. The final production is expected to reduce about 5.3% compared to normal year. The decrease main factors are due to drought during June to August 2023 and flood damage in September to October.

The dry season rice is in the sowing period. The planted area is forecast to decrease than last year due to water shortage from irrigation systems and natural resources for upporting dry season rice cultivation. The government suggests farmers to grow crops that require less water than rice.



JASMAI Precipitation Graph (Nakhon Sawan)

Vietnam

In the South, the other wet season rice (autumn-winter rice and seasonal rice) is in the harvesting stage and all harvesting is expected to be completed within this month. The harvested area reached 0.57 million hectares out of 1.21 million hectares planted. The yield forecasts higher than last year due to warm weather and better irrigation preparation.

On the other hand, the dry season rice (winter-spring rice) in the Mekong River Delta with an area of 0.3 million ha is in the growing stage under stable weather condition.

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