

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Vietnam

Grain and Feed Update

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Report Highlights:

Post revises its estimate of Vietnam's total production for MY 2011/2012 to 43.32 million tons of paddy rice, over 1.1 million tons higher than that of MY 2010/2011, mainly due to favorable weather conditions that allowed higher than previously estimated production of the Spring and Autumn crops in the Mekong River Delta (MRD) region. Post also revises its forecast numbers for MY 2012/2013 to 44.34 million tons, mainly to due to favorable weather conditions during planting that is allowing for expanded crops in the MRD, especially Spring and Autumn crops, the two main crop in the region.

Post:
Hanoi

Commodities:
Rice, Milled

Author Defined:
STATISTICAL TABLES

Vietnam's Production, Supply and Demand for Rice

Rice, Milled Vietnam	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2011		Market Year Begin: Jan 2012		Market Year Begin: May 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	7,607	7,067	7,670	7,740	7,660	7,840
Beginning Stocks	1,470	1,470	1,941	1,941	1,861	1,866
Milled Production	26,371	26,371	26,870	27,075	27,100	27,710
Rough Production	42,194	42,194	42,992	43,320	43,360	44,336
Milling Rate (.9999)	6,250	6,250	6,250	6,250	6,250	6,250
MY Imports	500	500	100	100	400	200
TY Imports	500	500	100	100	400	200
TY Imp. from U.S.	0	0	0	0	0	0
Total Supply	28,341	28,341	28,911	29,116	29,361	29,776
MY Exports	7,000	7,000	7,200	7,400	7,000	7,000
TY Exports	7,000	7,000	7,200	7,400	7,000	7,000
Consumption and Residual	19,400	19,400	19,850	19,850	20,100	20,100
Ending Stocks	1,941	1,941	1,861	1,866	2,261	2,676
Total Distribution	28,341	28,341	28,911	29,116	29,361	29,776

1000 HA, 1000 MT, MT/HA

PRODUCTION

Vietnam's Area, Yield, and Production for Rough Rice (as of November 2012)

Marketing Year	2010/2011 Revised		2011/2012 Estimate		2012/2013 Forecast	
	Old	New	Old	New	Old	New
Harvested Area (tha)						
Winter ¹	1,776	1,776	1,720	1,770	1,720	1,770
Spring ²	3,095	3,095	3,120	3,120	3,120	3,220
Autumn ³	2,740	2,740	2,830	2,850	2,820	2,850
TOTAL	7,607	7,607	7,670	7,740	7,660	7,840
Yield (mt/ha)						
Winter	4.67	4.67	4.69	4.68	4.70	4.70
Spring	6.29	6.29	6.39	6.39	6.45	6.45
Autumn	5.27	5.27	5.29	5.29	5.35	5.35
AVERAGE	5.54	5.54	5.60	5.60	5.65	5.65
Production (tmt)						
Winter	8,294	8,294	8,065	8,284	8,084	8,319
Spring	19,466	19,466	19,960	19,960	20,124	20,769
Autumn	14,434	14,434	14,967	15,076	15,087	15,248

TOTAL	42,194	42,194	42,992	43,320	43,294	44,336
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¹ Lua Mua (10th Month), ² Winter-Spring, ³ Summer-Autumn

Source: MARD, Post estimates

Estimate for MY 2011/2012 (began January 2012)

Post revises its estimate of Vietnam's total production for MY 2011/2012 from 42.99, [Post's last estimate in October 2012](#), to 43.32 million tons of paddy rice, over 1.1 million tons higher than that of MY 2010/2011, mainly due to favorable weather conditions that allowed higher than previously estimated production of the Spring and Autumn crops in the Mekong River Delta (MRD) region.

Forecast for MY 2012/2013 (begins January 2013)

Post also revises its forecast numbers upward for MY 2012/2013. This increases the forecast for Vietnam's total paddy rice production for MY 2012/2013 from 43.29 million tons to 44.34 million tons, mainly to due to favorable weather conditions during planting that is allowing for expanded crops in the MRD, especially Spring and Autumn crops, the two main crop in the region. (See production table)

According to the MRD provincial rice planting plan, the region expects to reach a rice planted area up to 1.68 million hectares, over 100,000 hectares more than average annual area, for the MY 2012/2013 Spring crop due to the favorable moderate flooding level that allowed growers to start planting the crop earlier and on a larger area than expected. Post forecasts the MY 2012/2013 harvested area for the Spring crop at about 100,000 hectares larger than that of MY 2011/2012. The MY 2012/2013 production, therefore, will increase by over 800,000 tons compared to the MY 2011/2012.

Vietnam Seasonal crop update for MY 2011/2012

Autumn Crop

The (MRD) typically accounts for more than 80 percent of the total Autumn crop planting area in Vietnam. The Autumn crop in the MRD is comprised of a main Autumn crop and a late Autumn crop.

As of November 25, 2012, Vietnam's MY 2011/2012 total Autumn crop planted/harvested area is about 2.85 million hectares, according to MARD numbers, provincial numbers and Post's estimate. This includes completed harvest of 1.67 million hectares of main Autumn crop in the MRD, completed harvest of 0.44 million hectares in the other provinces, and on-going harvest of 0.74 million hectares of late Autumn crop in the MRD -- an increase of 20,000 hectares from [Post's October estimate](#), due to the favorable moderate flooding level that allowed growers to plant the crop on larger area.

Post revises harvested area for the MY 2011/2012 Autumn rice crop from 2.83 million hectares to 2.85 million hectares, due to the increase of late Autumn crop area in the MRD. Its total production is consequently increased from 14.97 million tons to 15.08 million tons.

Winter Crop

As of November 15, 2012, According to Ministry of Agriculture and Rural Development's monthly report (MARD), Vietnam's MY 2011/2012 total Winter crop planted area is increased by about 50,000 hectares compared to [Post's October estimate](#), from 1.72 to 1.77 million hectares. This area is identical to MY 2010/2011.

Mekong River Delta (MRD) Rice Production

Autumn Crop

The Autumn crop in the MRD is comprised of a main Autumn crop and a late Autumn crop.

Post estimates the planted area of late Autumn crop in the MRD continued increasing to 740,000 hectares in MY 2011/2012, due to the good selling price on the market and favorable weather conditions. By November 22, 2012, there were around 430,000 hectares harvested out of over 740,000 hectares of MY 2011/2012 late Autumn crop planted area in the MRD, according to the Vietnam Food Association's (VFA) weekly report.

Rice Production in the Mekong Delta by Marketing Year *(000 ha; mt/ha; 000 mt)*

	2010/2011 (Revised)			2011/2012 (Estimate) (old)			2011/2012 (Estimate) (new)		
	Area	Yield	Prod.	Area	Yield	Prod.	Area	Yield	Prod.
Winter	212	4.06	861	200	4.30	860	200	4.30	860
Spring	1,616	6.56	10,600	1,579	6.86	10,832	1,579	6.86	10,832
Autumn	1,646	5.40	8,888	1,670	5.50	9,185	1,670	5.50	9,185
Late Autumn	640	4.84	3,098	720	4.86	3,500	740	4.86	3,596
Total	4,114		23,447	4,169		24,377	4,189		24,473

Source: *MARD, Post estimate*

TRADE / COMPETITION

Trade

Export

Post revises Vietnam's MY2011/2012 total rice exports from 7.2 to 7.4 million tons due to very strong recent demand from China and continued demand from its traditional markets, such as the Philippines, Indonesia, Malaysia, Cuba, and African countries.

Imports

Vietnam often imports from Cambodia approximately 400,000-500,000 tons on milled rice basis annually. Paddy was brought and milled in Vietnam due to uncompetitive milling costs in Cambodia. Paddy that was brought into Vietnam this year, however, bounced back into Cambodia for diverting to other channels which had very attractive buying prices. There is no official number on the paddy and milled rice shipped in and out of Vietnam along the border. The local MRD rice millers and exporters estimate that the majority quantity of milled rice from paddy shipped into Vietnam from Cambodia was brought back to Cambodia. Post estimates around 100,000 tons of milled rice being imported from Cambodia into Vietnam in MY 2011/2012. The MY 2012/2013 rice imports from Cambodia are forecast at about 200,000 tons, still lower than the earlier average number due to Vietnam's expected increase in local rice production.

(See also [Grain and Feed Annual 2012](#))

