



RICE GROWING OUTLOOK REPORT

NOVEMBER 2023





Rice Growing Outlook Report

November, 2023

Overview

In the Northern side of SE-Asia, this month is the peak harvest of rainy season rice. 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 the drought. In Thailand, the final production is to be "poor" due to a reduction in planted area and yield due to drought, as well as damage caused by heavy rain in September and October. However, it is not a serious condition that will affect the market. The dry season rice is in field preparation to seeding stage under favorable weather conditions.

In the Southern side of SE-Asia, the harvesting of dry season rice is almost finished this November. In Indonesia, the total harvested area of dry season rice so far is 3.7 million hectares. The yield condition is forecast to be better than last dry season. While the planting of wet season rice is underway, the progress is delayed than last year due to unstable weather.

Brunei

The wet season in Brunei is well underway. Rainfed areas in Brunei are about 90% completed in wet season rice planting with most areas in tillering stage, whereas planting in irrigated areas is about 50% completed. Outlook is currently fair although there have been a slight delay in planting due to heavy rainfall occurring throughout the month.

Cambodia

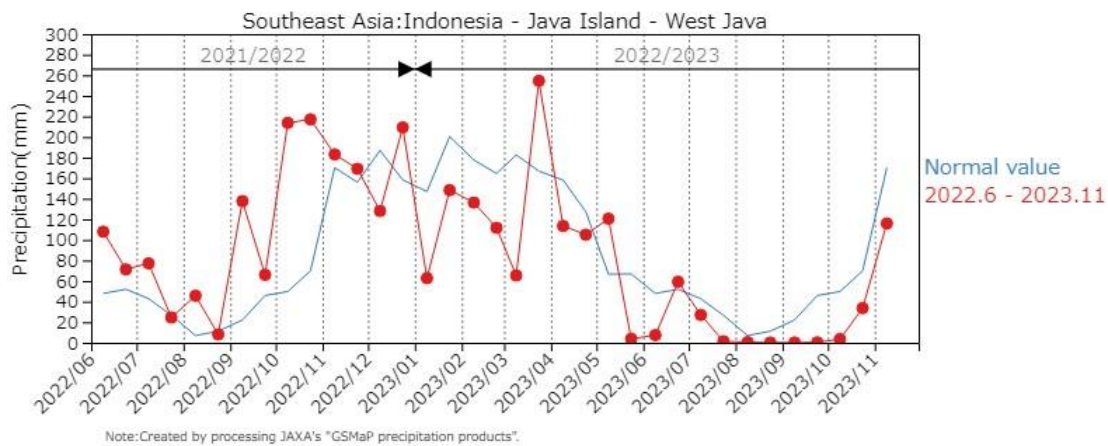
The harvested area of wet season rice has reached 1 million ha. The yield estimates 3.7 tons per hectare and it's almost same level as last year. While the dry season rice is currently in sowing stage, the current planted area reaches 23 percent of national plan (496 thousand hectares). The growing condition is good due to enough irrigation water and sunshine.

Indonesia

The harvesting of dry season rice is almost finished this November. The total harvested area of dry season rice so far is 3.7 million hectares and it is 6.7% lower than last year. The yield condition is forecasted to be better than last dry season due to enough sunlight during the growing season.

This November is the second month of planting wet season rice. The planting of wet season rice is 1.3 million hectares and it is 11.5% lower than last dry season. The progress of planting is line in with the average year despite uneven precipitation and farmers still waiting for the best time to plant. This water shortage condition seems to be recovered in Java and some other areas by rainfall that occurred in early November.

Some regions are still reporting drought but have not caused significant damage to rice growing



JASMAI Precipitation Graph (West Java)

Laos

The wet season rice is in the harvesting stage under good yield conditions. The harvesting works this year are late with the previous years due to starting of rainy season late. The final harvested area is estimated around 796 thousand hectares and the production is expected to 3.5 million tons.

On the other hand, the final harvesting area of upland rice is expected to be around 101 thousand hectares, with a yield of 2.05 tons/ha.

Malaysia

The planting of wet season rice started from this August and it'll continue until the end of February. The planting progress for wet season rice is approximately 37 percent with notional plan, it is slower than a normal year due to heavy rains in the eastern part of Peninsular Malaysia, resulting in flooding in some areas. On the other hand, the planting area is expected to be increased than initial prospect following the recent subsidy announcement by government.

The planted rice in early August in the northwest part has started the harvest under favorable conditions.

Myanmar

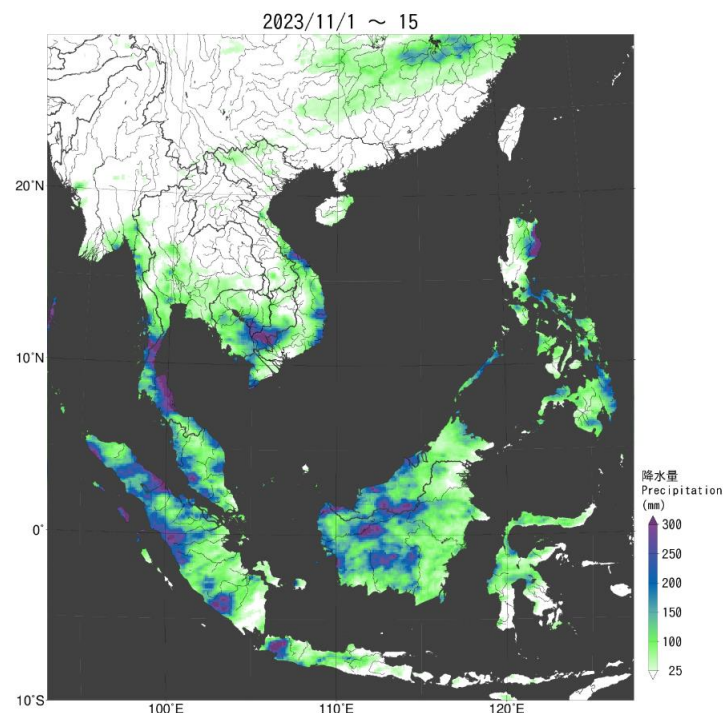
Up to this month, the harvest of wet season rice reaches 935 thousand hectares accounting for 15.4% of the planted area of 6.07 million hectares. Progress of the harvesting work is similar to last year. About 4 million tons of paddy has been produced with a yield of 4.27 tons per hectare. The yield is good and higher than last year.

Last month, severe floods occurred mainly in the delta region. However, the most damaged areas have been replanted for the wet season rice and the rest areas would be grown winter crops in line with respective cropping patterns. In this month, no severe flood occurred in the rice field although there were some rainy days. The overall growing condition of the wet season rice is good and most of the wet season rice is at grain filling stage.

Philippines

Wet season rice planted in July to August is in maturing to harvesting stage. In October 2023, several weather systems including the passage of typhoon “Jenny” affected the country, however, no major damage in agriculture sector was reported.

For now, the crop growing condition of wet season rice in most parts of the country may have a fair to good yield.



JASMAI Precipitation Map (early November)

Thailand

The wet season rice is in the harvesting period. The total harvested area is about 9.3 million hectares, 1.8% lower than last year. In addition, the yield also would be reduced by drought during June to August 2023 and flood damage in September to October. The growing condition of wet season rice is poor and it is predicted that total production will decrease about 5%.

The dry season rice is in the land preparation period. Planted area is forecast to decrease from last year due to not sufficient water supply from irrigation systems and national resources.

Vietnam

In the North, the wet season rice is in the harvesting stage with an area of 0.75 million hectares out of the total 1.01 million hectares planted. All harvesting is expected to be completed within this month. The yield is estimated at around 5.5 tons per hectare. It is the same as the last year.

In the South, the other wet season rice (autumn-winter rice and seasonal rice) is in the harvesting stage with a total harvested area of 0.42 million hectares. The yield is forecast around 5.6 tons per hectare higher than last year due to warm weather and better irrigation preparation.

On the other hand, some provinces in the Mekong Delta start the sowing of dry season rice (winter-spring season).

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