

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## **Vietnam**

### **Grain and Feed Update**

#### **Lockup report November 2011**

**Approved By:**

Dwight Wilder

**Prepared By:**

Quan Tran

**Report Highlights:**

Post revises Vietnam's MY2010 total rice production from 41.69 to 42.10 million tons (over 2 million tons higher than MY2009), paddy basis, due to better production in all Vietnam's seasonal crops compared with MY2009.

Post:  
Hanoi

Commodities:  
Rice, Milled

Author Defined:  
**STATISTICAL TABLE**

**Vietnam's Production, Supply and Demand for Rice**

Rice, Milled Vietnam	2009/2010		2010/2011		2011/2012	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Harvested</b>	7,415	7,415	7,545	7,605	7,440	7,555
<b>Beginning Stocks</b>	1,961	1,961	1,470	1,470	1,727	1,884
<b>Milled Production</b>	24,993	24,993	26,057	26,314	25,430	26,160
<b>Rough Production</b>	39,989	39,989	41,691	42,102	40,688	41,856
<b>Milling Rate (.9999)</b>	6,250	6,250	6,250	6,250	6,250	6,250
<b>MY Imports</b>	400	400	500	500	500	400
<b>TY Imports</b>	400	400	500	500	500	400
<b>TY Imp. from U.S.</b>	0	0	0	0	0	0
<b>Total Supply</b>	27,354	27,354	28,027	28,284	27,657	28,444
<b>MY Exports</b>	6,734	6,734	7,000	7,000	6,700	6,700
<b>TY Exports</b>	6,734	6,734	7,000	7,000	6,700	6,700
<b>Consumption and Residual</b>	19,150	19,150	19,300	19,400	19,550	19,550
<b>Ending Stocks</b>	1,470	1,470	1,727	1,884	1,407	2,194
<b>Total Distribution</b>	27,354	27,354	28,027	28,284	27,657	28,444

1000 HA, 1000 MT, MT/HA

**PRODUCTION**

**Vietnam's Area, Yield, and Production for Rough Rice (as of November 2011)**

Marketing Year	2009 Revised		2010 Estimate		2011 Forecast	
	Old	New	Old	New	Old	New
<b>Harvested Area (tha)</b>						
Winter <sup>1</sup>	1,768	1,768	1,750	1,780	1,745	1,760
Spring <sup>2</sup>	3,035	3,035	3,095	3,095	3,035	3,095
Autumn <sup>3</sup>	2,612	2,612	2,700	2,730	2,660	2,700
<b>TOTAL</b>	<b>7,415</b>	<b>7,415</b>	<b>7,545</b>	<b>7,605</b>	<b>7,440</b>	<b>7,555</b>
<b>Yield (mt/ha)</b>						
Winter	4.61	4.61	4.60	4.65	4.60	4.65
Spring	6.22	6.22	6.29	6.29	6.25	6.30
Autumn	4.96	4.96	5.25	5.26	5.25	5.25
<b>AVERAGE</b>	<b>5.39</b>	<b>5.39</b>	<b>5.53</b>	<b>5.53</b>	<b>5.51</b>	<b>5.54</b>
<b>Production (tmt)</b>						
Winter	8,155	8,155	8,050	8,277	8,027	8,184

Spring	18,878	18,878	19,466	19,466	18,969	19,498
Autumn	12,956	12,956	14,175	14,360	13,965	14,175
<b>TOTAL</b>	<b>39,989</b>	<b>39,989</b>	<b>41,691</b>	<b>42,103</b>	<b>40,961</b>	<b>41,857</b>

<sup>1</sup> Lua Mua (10<sup>th</sup> Month), <sup>2</sup> Winter-Spring, <sup>3</sup> Summer-Autumn  
Source: MARD, Post estimates

### **Estimate for MY 2010 (began January 2011)**

Post revises Vietnam's MY2010 total rice production from 41.69 to 42.10 million tons, paddy basis, due to higher production in all seasonal crops (Winter, Spring, Autumn crops) compared with MY2009. As the result, Vietnam's MY2010 rice production is over 2 million tons higher than MY2009. Post also revises upward the production forecast for MY2011 (calendar year 2012) seasonal rice due to Ministry of Agriculture and Rural Development (MARD) planting projections.

MY2011 production is now forecast 0.9 million tons higher than the previous estimate, reaching 41.86 million tons -- just slightly lower than MY2010 rice production. MY2011 rice imports are revised down from 500,000 tons to 400,000 tons due to flooding that negatively affected the rice crop in Cambodia -- Vietnam's primary rice import source.

### **MY 2010 Autumn crop**

Post raises the late Autumn crop harvested area in the Mekong River Delta by 30,000 hectares (630,000 hectares compared to 600,000 hectares in our last estimate). As such, the overall total Autumn crop harvested area is increased from 2.70 to 2.73 million hectares. According to the MARD updated number, the total planted area is 650,000 hectares for late Autumn crop. Post estimates the loss in area at about 20,000 hectares due to flooding.

Due to the increase in late Autumn crop rice yield, the overall Autumn crop yield rose from 5.25 tons per hectare to 5.26 tons per hectare.

### **MY 2010 Winter Crop**

Post revises the Winter crop harvested area from 1.75 to 1.78 million hectares. According to MARD, the total planted area for this crop is around 1.80 million hectares. Post estimates about 20,000 hectares were lost due to flooding in the central region of Vietnam and the Mekong River Delta.

Post revises Winter crop rice yield from 4.60 tons per hectare to 4.65 tons per hectare due to yield increases in all parts of the country -- especially the northern part of Vietnam, which accounts for 66 percent of Vietnam's total Winter crop area. According to MARD's November report, the winter rice yield in the northern region was estimated at 4.9 tons per hectare, up from the 4.87 tons per hectare estimated for the previous crop. Yields in the northern region are the highest yields in Vietnam compared to the other parts of the country.

### **The Mekong River Delta (MRD) Rice Production**

The Mekong River Delta (MRD) is the only region planting late Autumn crop. The MRD local authorities and farmers are looking at expanding this crop while maintaining the scale of the Winter crop. The main difference between the two crops is that newer high-yielding varieties are used for the late Autumn crop, and rice from this crop is mainly for export; more traditional,

quality profile varieties are used for the Winter crop and its rice is mainly for local consumption.

As of November 15, 2011, the late Autumn crop harvest progress was about 62 percent of the total planted area, according to the provincial Departments of Agriculture and Rural Development.

The planted area for the Winter crop was estimated at 235,000 hectares and the harvested area for this crop has already reached 50,000 hectares, or about 21 percent of the MRD Winter crop planted area.

Farmers are planting the new Spring crop (MY2011) shortly after harvesting the late Autumn crop. As of November 15, the ongoing planted area was reported at 200,000 hectares. Total planted area for the MY2011 Spring crop is projected at 1.56 million hectares in the MRD.

### Rice Production in the Mekong Delta by Marketing Year

(000 ha; mt/ha; 000 mt)

	2009 (Revised)			2010 (old)			2010 (Estimate) (new)		
	Area	Yield	Prod.	Area	Yield	Prod.	Area	Yield	Prod.
<b>Winter</b>	222	3.95	877	240	3.90	936	230	4.00	920
<b>Spring</b>	1,559	6.56	10,227	1,616	6.56	10,600	1,616	6.56	10,600
<b>Autumn</b>	1,644	4.92	8,088	1,646	5.40	8,888	1,646	5.40	8,888
<b>Late Autumn</b>	512	4.63	2,371	600	4.70	2,820	630	4.80	3,024
<b>Total</b>	3,937		21,563	4,102		23,244	4,122		23,432

Source: *MARD, Post estimate*