

ASEAN Early Warning Information

CROP SITUATION



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Brunei Darussalam

Crop Situation in 2023 (P.1/2)

The weather in Brunei Darussalam in 2023 is favorable for cultivating crops. The cultivated areas have appropriate rainfall with an average amount of 20-50 millimeters per day, sufficient sunlight for the plants, and good water management and irrigation system in the country, these allow farmers to grow crops for the whole year. The average temperature is 38 degrees Celsius. **Regarding the effect of the climate change and global warming situation**, weather is more erratic. In the last few years, there has been situations where rain was lower than expected during important rice cultivating season causing lower water level in the dam which affected water flow to the major rice field and causing some reduction in yield. Thus, the government and farmers collaborate in water management to effectively reduce damage from these situations. Moreover, the government helps alleviate the suffering of agriculture from these situations by supporting new technologies to farmers and improving irrigation facilities systems to mitigate the risks of low water supply. While farmers adjusted their cultivation plan or new planting times to suitable for changing in weather patterns. The situation of the main crops can be described as follow.

Rice planted area is expected to increase as the weather is suitable for crop cultivation and there is good water management and irrigation system together with government policies, **which are the expansion of new commercial rice production area in KANDOL** (Kandol Agriculture Development Area) and increase supply for High Yielding Hybrid Rice Seeds variety, **Sembada188** to farmers. However, rice production is forecast to decrease because of **Rice Leaffolders (LF)** infestation and labor shortage in some rice plantations. It was observed that there is an increase in infestation of Rice Leaf Folder in rice plantation. The harvesting period of rice in 2023 is around from February 2023 to May 2023 in the wet season, and from July to October 2023 in the dry season.

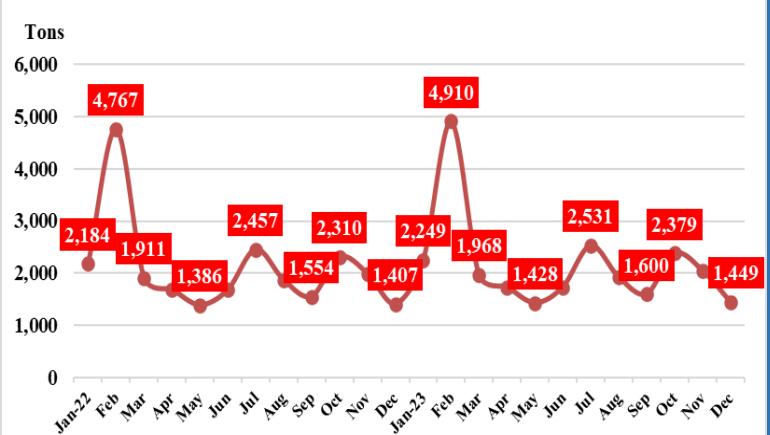


Figure 1: Monthly quantity of rice import in 2022-2023

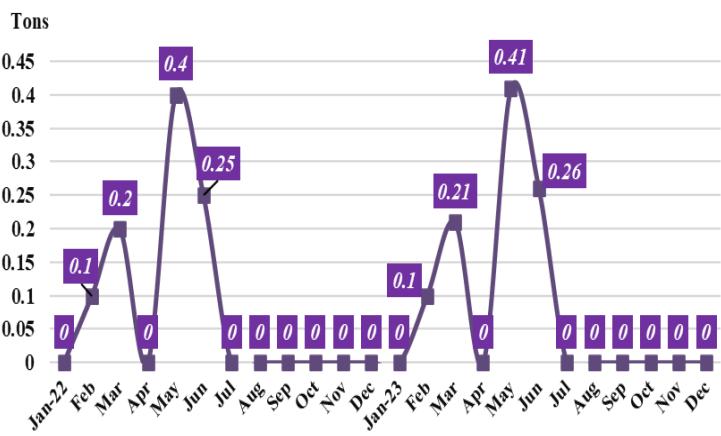


Figure 2: Monthly quantity of cassava import in 2022-2023

For cassava, the production is expected to decline due to Nematode destroy cassava roots, and flood affected to tubers rot due to submerged under water for prolonged period of time. Moreover, cassava is lower demand for processing industry compared to the previous year.

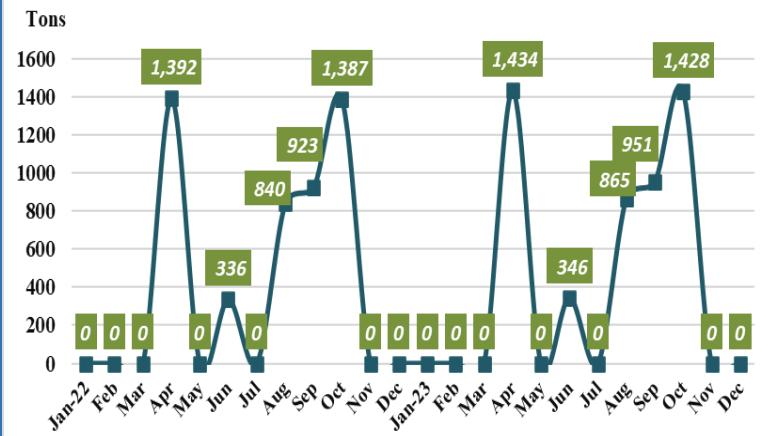


Figure 3: Monthly quantity of sugar import in 2022-2023

For sugarcane, the production is forecast to increase from the previous year because the weather is suitable for planting crops, and farmers also take good care of crops and use more fertilizer resulting in the increase in yield.





Brunei Darussalam



Crop Situation in 2023 (P.2/2)

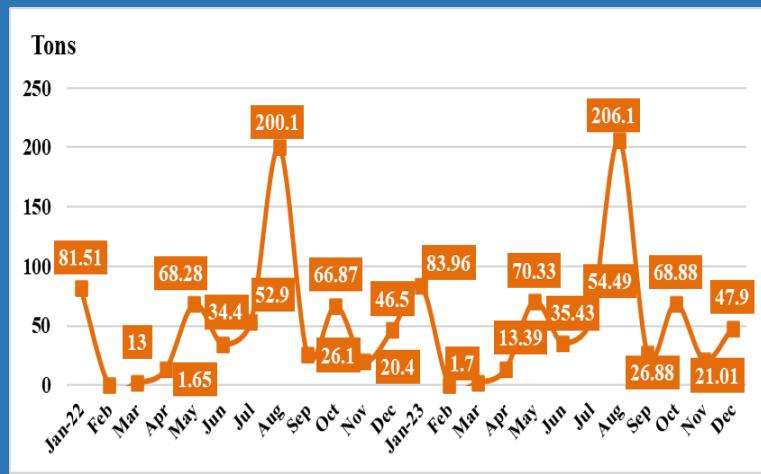


Figure 4: Monthly quantity of soybean import in 2022-2023

For Corn, the planted area is forecast to increase from the previous year because the weather is suitable for planting crops, farmers respond to price increase which encourages corn farmers to expand planted areas, and farmers favor corn planting as it requires less work labor for management. Farmers also take good care of crops, use good variety, and use more fertilizer resulting in the increase in yield.



CAMBODIA

Crop Situation in 2023

The overall weather in Cambodia in 2023 (2022/2023) is unfavorable for cultivating crops. With low rainfall, the amount of rain is 20% to 30% lower than the average for many years. However, there is a good water management and good irrigation system in the country which allows farmers to grow crops for the whole year. **Mostly Cambodia's natural disasters are flood and drought.** Those areas with flood are Banteay Meanchey, Battambang, Kampong Thom, Kampong Cham, Tbong khmom, Siem Reap, Pursat, and Prey veng, while those areas with drought are Banteay Meanchey, Battambang, and Pursat.

According to climate change and global warming situation, agricultural products in Cambodia have affected from climate change and global warming situation. The climate change and global warming situation that have been occurred in Cambodia are extreme drought conditions (*El Nino*) during the year and hotter than usual during the day and night. Furthermore, the Ministry of water resources and meteorology announces that 1) Cambodia may be influence by (*El Nino*) 60% and (Neutral) which were Transitional phenomena (*El Nino* and *La Nina*) from May to August 2023, and 2) Cambodia may be influence by (*El Nino*) 70-80% and (Neutral) decreased from 20-30% from September to November 2023. These phenomena may result in drought and flood, and may cause environmental pollution which affect to agricultural products in Cambodia. Thus, the government helps alleviate the suffering of agriculture from the effects of global warming and climate change by supporting new technologies to farmers, increasing channels for farmers to access to credit, providing seed to farmers after damage by disasters (flood and drought) to recovery of crops productions, providing markets for farmers, coordinating and delivering agriculture extensions services to support both technically and financially from national to local communities, encouraging and empowering women to cope with disaster risk and climate change impact on farming and livestock, and promoting climate resilience through improving food, water and energy security. While farmers adjusted their cultivation plan or new planting times to suitable for changing in weather patterns, and used good variety that are resistant to climate change and global warming for reducing the risk caused by climate change and global warming. The situation of five main crops can be described as follow.

The planted area of rice in this year is expected to rise from the last year due to the rising rice price together with government policies for promoting new rice varieties and encouraging farmers to use these new rice varieties for producing rice to meet market demand and requirement, especially for exporting markets. However, rice production is forecast to decrease due to labor shortage, low rainfall, flood in harvesting period occurred in the wet season, and drought in harvesting period occurred in the dry season. The total damaged areas are 100,488 hectares, and the damaged areas caused by the climate change and global warming is approximately 3% of the total damaged areas. **The harvesting period of rice in 2023** is from August to December 2023 for wet season, and from February to April 2023 for dry season.



Figure1: Monthly quantity of rice export in 2021-2022

For maize, the planted area is forecast to increase from the previous year due to the government policies to encourage farmers to continue to save and use water sparingly at a high level. Maize production is also expected to increase because farmers use improved seed varieties. **The harvesting period of maize** is July to September 2023 for wet season, and February to March 2023 for dry season.

For cassava, the planted area is expected to increase from the previous year as the price of cassava goes up. However, cassava production is forecast to decline due to unfavorable weather affected by droughts, diseases, and pests. **The harvesting period** is from November 2023 to January 2024.

For sugarcane, the planted area is estimated to increase from last year due to the rising sugarcane price. However, the sugarcane production is expected to decrease because of unfavorable weather caused by droughts. **The harvesting period of sugarcane in 2023** is from November 2023 to December 2023 or January 2024.

The planted area of soybean is predicted to rise from the last year due to the rising soybean price prices. Likewise, soybean production is expected to increase because farmers use improved crop varieties and take good care of their crops from planting period to harvesting period. **The harvesting period of soybean in 2023** is during late of September to October 2023.



INDONESIA



Crop Situation in 2023 (P.1/2)

The weather in Indonesia in 2023 (2022/23) is favorable for growing crops as there are suitable sunlight, proper temperature, and adequate rainfall for crops due to good water management and irrigation system for planting crops. According to the Meteorology and Geophysics Agency forecast for April-September 2023, Indonesia has the opportunity to rain with low intensity or potential to be dry with rainfall less than 100 millimeters per month. With regard to climate change and global warming, it is estimated to be light El Nino, La Nina has ended in March 2023, and there is a 50-60 percent chance of El Nino starting in April 2023. However, agricultural products in Indonesia have no affected much from climate change and global warming situations. This is because the government has implemented new policies to mitigate risks and damage that might occur from natural disasters for farmers by supporting new technologies to farmers and providing farmers with basic information to prepare for climate change that may occur in the future. At the same time, the government and farmers collaborate in water management to effectively reduce damage from these situations. While farmers adjust their planting plans or new planting times to suitable for changing in weather pattern, and use good varieties that are resistant to climate change for reducing the risk caused by climate change and global warming. The situation of five main crops can be described as follow.

Rice production is forecast to increase due to the expansion of planted areas. The planted area is expected to increase because the weather is favorable for planting crops and the government provides input subsidies such as seeds, fertilizers, and plant medicines to support production. Farmers also use good varieties, take good care of their crops, and used more fertilizer from planting period to harvesting period resulting in the increase in yield. **The harvesting periods in 2023** are from October 2022 to March 2023 for wet season and from April to September 2023 for dry season.

For maize, the planted area is expected to increase from previous year because the weather is suitable for planting crops and the government provides input subsidies such as seeds, fertilizers, and plant medicines to support production. Farmers also take good care of crops, use good varieties, and use more fertilizer resulting in the increase in yield. **The harvesting period of maize in 2023 can be divided into 3 periods** which are during January to April 2023 for the first crop, May to August 2023 for the second crop, and September to December 2023 for the third crop.

For sugarcane, the planted area is expected to increase from previous year because the government encourages an increase in sugar production by extending the sugarcane area program. Farmers also take good care of crops resulting in the increase in yield. **The harvesting period in 2023** is from January 2023 to November 2023.

Soybeans production is forecast to increase due to the expansion of planted and harvested areas. The planted area of soybean is expected to increase because the government provides input subsidies such as seeds, fertilizers, and plant medicines to support production. Farmers also take good care of crops, use good varieties, and use more fertilizer resulting in the increase in yield. **The harvesting periods of soybean in 2023 are divided into 3 phrases** which are January to April 2023 for the first crop, May to August 2023 for the second crop, and September to December 2023 for the last crop.



Figure 1: Monthly quantity of rice import and export in 2022-2023

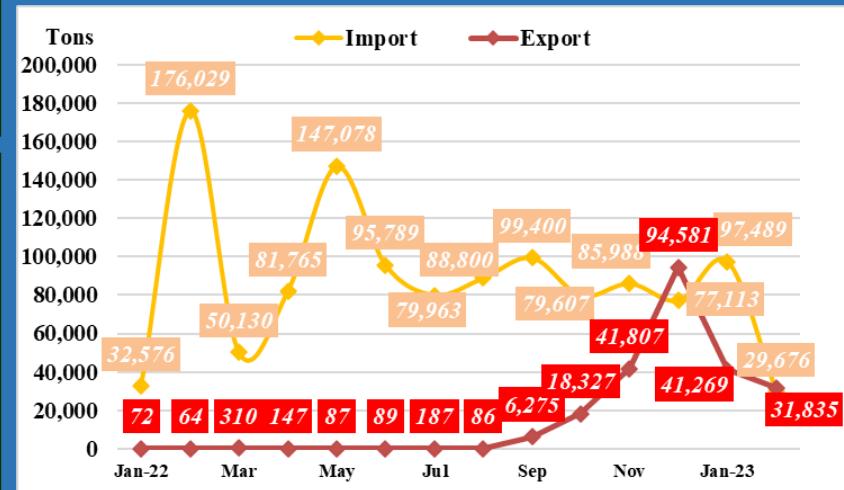
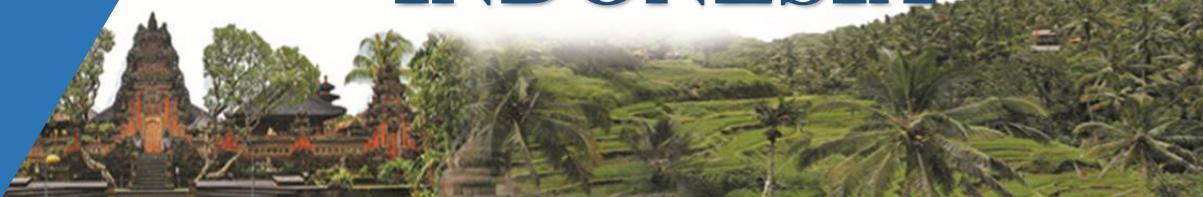


Figure 2: Monthly quantity of maize import and export in 2022-2023



INDONESIA



Crop Situation in 2023(P.2/2)

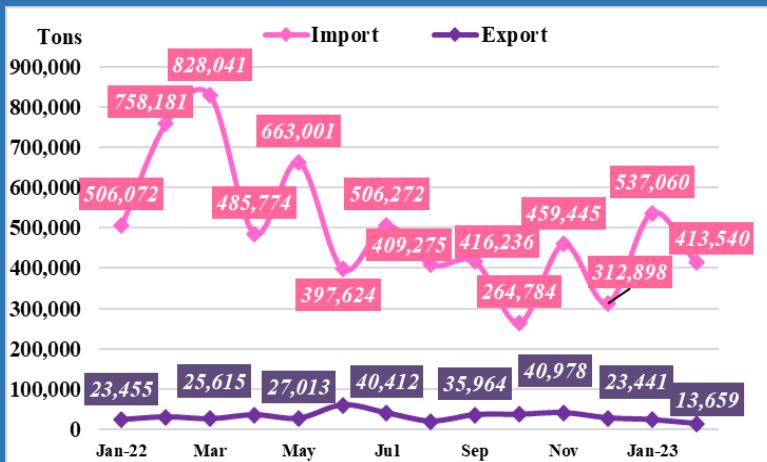


Figure 3: Monthly quantity of sugar import and export in 2022-2023

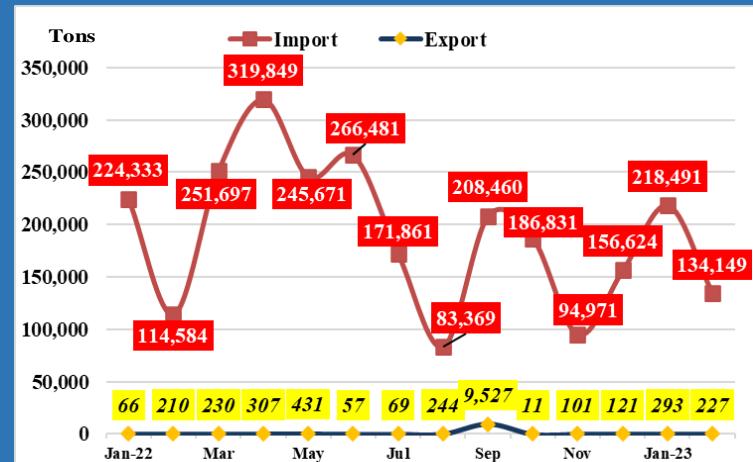


Figure 4: Monthly quantity of soybean import and export in 2022-2023

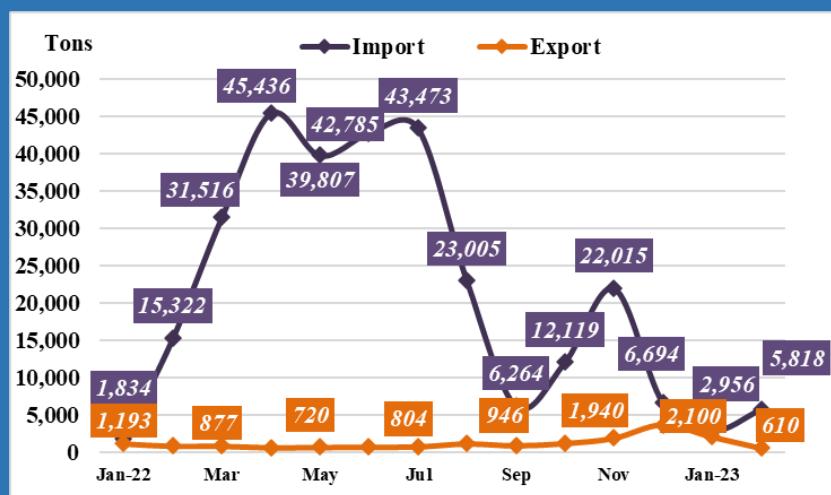
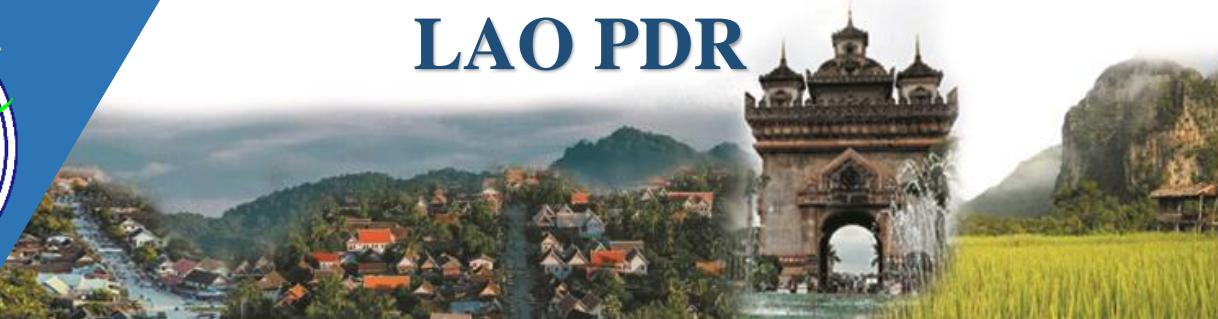


Figure 5: Monthly quantity of cassava import and export in 2022-2023

Cassava production is forecast to decline due to the decreasing in planted area, harvested area, and yield. The planted area of cassava is expected to decrease due to the declining prices of cassava, raising prices of competing crops and competing with other food crops and horticultural commodities. Besides, farmers do not maintain crops properly because prices are less attractive resulting in the decrease in yield. **The harvesting period of cassava in 2023 can be divided into 3 phrases** which are January to April 2023 for the first crop, May to August 2023 for the second crop, and September to December 2023 for the last crop.



LAO PDR



Crop Situation in 2023 (P.1/2)

The weather situation of Lao PDR in 2023 (2022/2023) is low rainfall, the amount of rain ranges from 0.5 - 20 millimeters per day. However, with a sufficient sunlight for the plants, and sufficient amount of water supply resulted from good water management and irrigation system which allows the farmers to use water per crops' need, farmers are capable to cultivate crops for the whole year. **With regard to climate change and global warming, agricultural products in Lao PDR have no affected from climate change and global warming situations.** This is because the government has implemented various policies to mitigate risks and damage that might occur from natural disasters by providing markets for farmers and cooperating with farmers in water management. **In terms of importing situation,** the import of rice is expected to increase to ensure that the population will have sufficient food as well as maintain food security. **The imports of maize and sugar are forecast to decrease** because domestic productions are sufficient for the domestic consumption. **For the export situation, the exports of maize, sugar and cassava are forecast to increased** due to the increasing demand of these products from trading partner countries and high prices of these products in the world market. **While, the export of rice is predicted to decrease** because famers keep their production for their household consumption caused by high price of rice and insufficient household production. The production situations of five main crops are as follows.

For rice, the planted area is expected to increase due to the increasing price of rice and government policy for supporting export. The production is expected to increase as farmers take good care of crops, together with favorable weather. **The harvesting period of rice in 2023** is from October 2022 to December 2022 for wet season, and from March to May 2023 for dry season.

For maize, the planted area is estimated to increase due to the increasing price of maize and government policy. However, the production of maize is forecast to remain the same as the previous year. **The harvesting period of maize in 2023** is from September 2022 to November 2022 for wet season, and from January 2023 to May 2023 for dry season.

For Soybean, the planted area and production are estimated to remain the same as the previous year. The harvesting period of soybean in 2023 is during September 2022 to November 2022 for wet season and February 2023 to March 2023 for dry season.

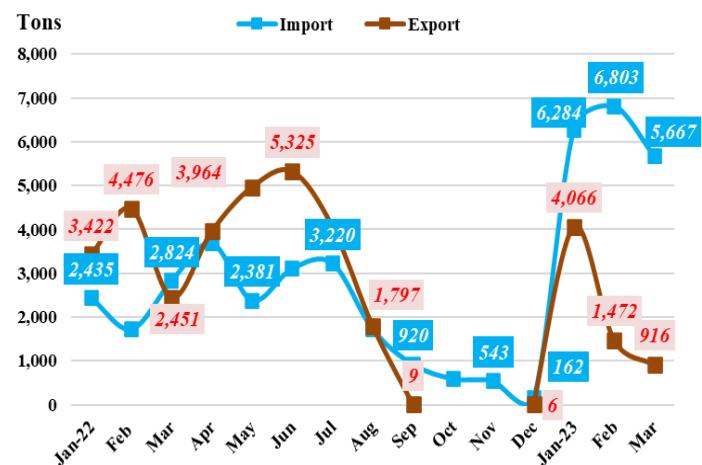


Figure 1: Monthly quantity of rice import and export in 2022-2023

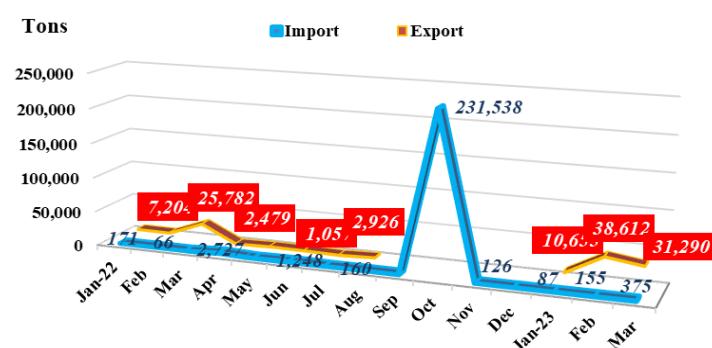
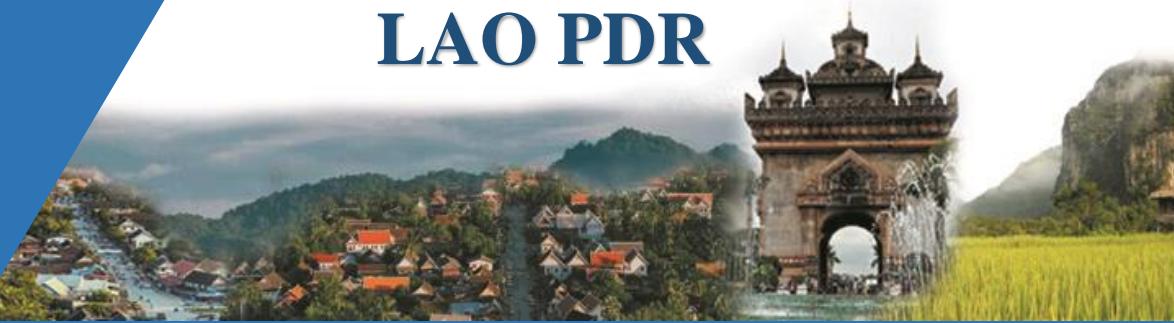


Figure 2: Monthly quantity of maize import and export in 2022-2023





LAO PDR



Crop Situation in 2023 (P.2/2)

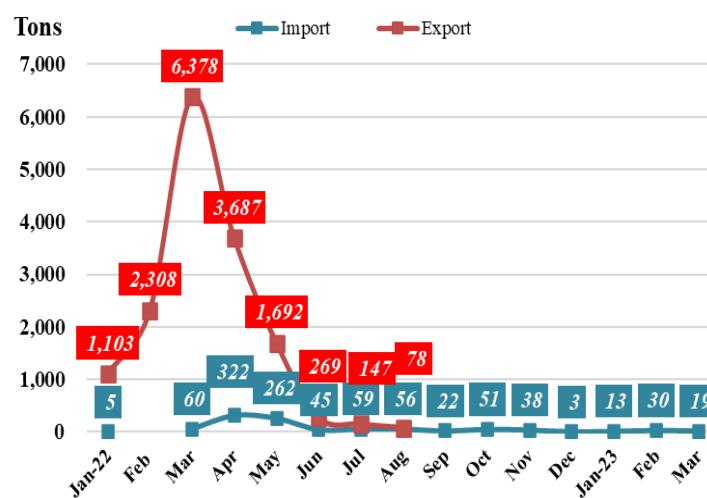


Figure 3: Monthly quantity of soybean import and export in 2022-2023

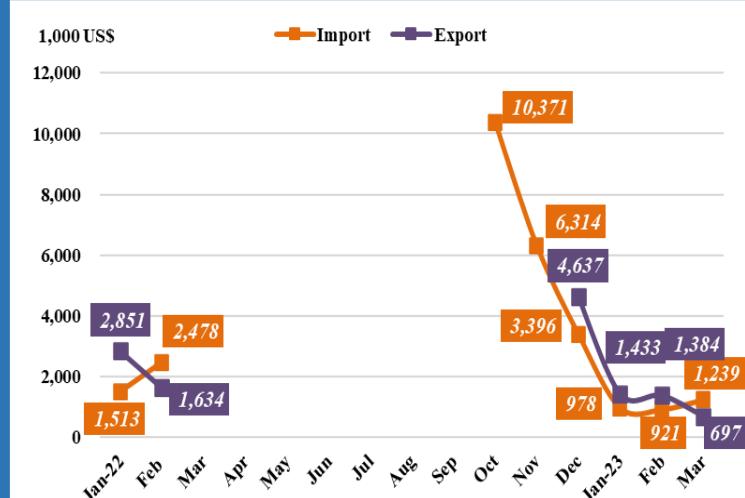


Figure 4: Monthly value of sugar import and export in 2022-2023

For sugarcane, planted area and production are predicted to increase due to the rising sugarcane price, declining prices of the competing crops, the governmental support under the project which focuses on producing crops that have the potential to be commercialized for export, and good taking care of the crops by famers together with favorable weather. **The harvesting period of sugarcane in 2023** is from January 2023 to May 2023.

The production of cassava is forecast to increase due to the increase in planted area and yield. The planted area is expected to increase due to the increasing price of cassava and government policy for supporting export. The yield is expected to increase because farmers take good care of their crops and use more fertilizer. **The harvesting period of cassava in 2023** is during December 2022 to May 2023.

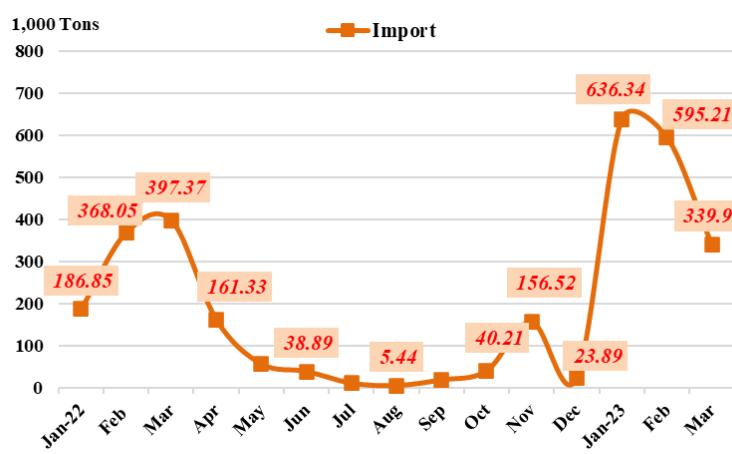


Figure 5: Monthly quantity of cassava import in 2022-2023

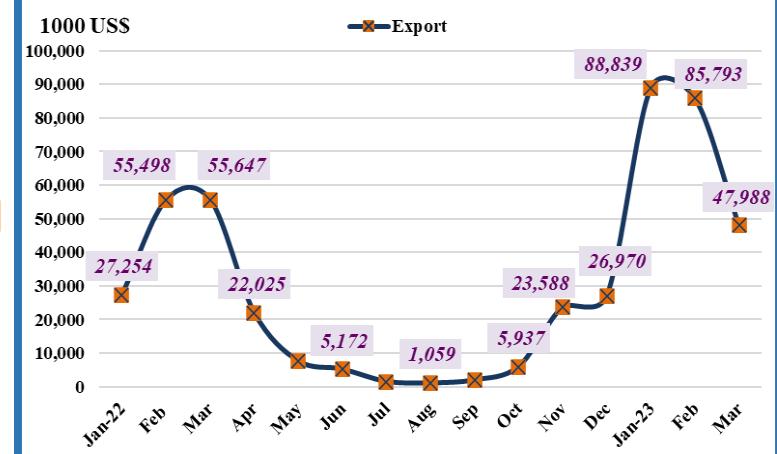


Figure 6: Monthly value of cassava export in 2022-2023



MALAYSIA

Cron Situation in 2023

The natural disasters that have occurred in Malaysia in 2023 (2022/2023) were floods. These floods (as of Nov 2022 – Feb 2023) caused damaged area in many provinces which were Kelantan (Machang, Pasir Mas, Pasir Puteh, Tanah Merah, Tumpat, Kota Bharu Utara, Bachok), Kedah (Sik, Kuala Muda, Bandar Bharu), Selangor (Sabak Bernam), Johor (Tangkak, Batu Pahat), Perak (Perak Tengah), Terengganu (Hulu Terengganu, Setiu, Kuala Nerus, Dungun, Besut, Marang, Kuala Terengganu), Pahang (Rompin, Pekan), Sarawak (Limbang, Tebedu) and Pulau Pinang (Seberang Perak Utara, Seberang Perak Selatan), with approximately damaged of rice planted area around 3,445.17 hectares. With regard to the import situations, the import of rice is expected to increase to ensure that the population will have sufficient food as well as maintain food security per domestic consumption. Besides, maize and cassava import are also forecast to increase to sufficient food processing factories and feed processing factories with ingredients for economic viability and also to meet the demand. In terms of rice, maize and cassava export are expected to rise as the exports are necessary to survive economically and to respond to the other countries demand. On the other hand, the import and export of soybean and sugar are expected to decrease due to the lower demand for these products.

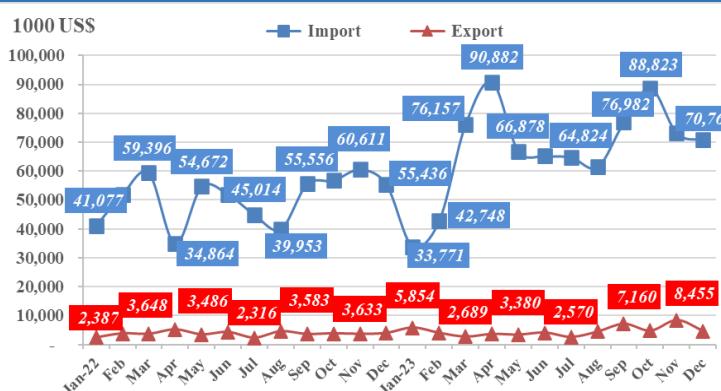


Figure 1: Monthly value of rice import and export in 2022-2023

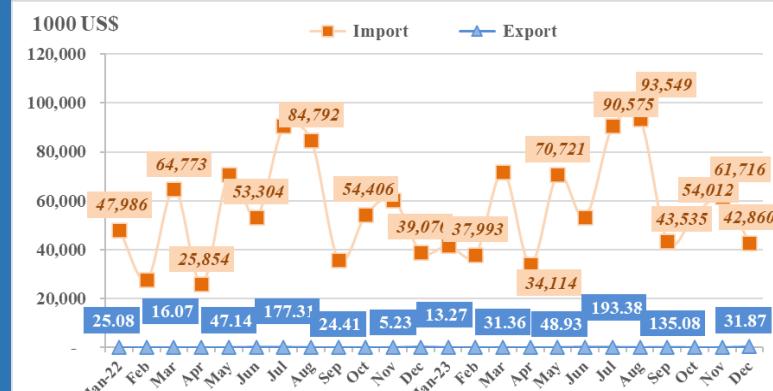


Figure 2: Monthly value of maize import and export in 2022-2023



Figure 3: Monthly value of soybean import and export in 2022-2023

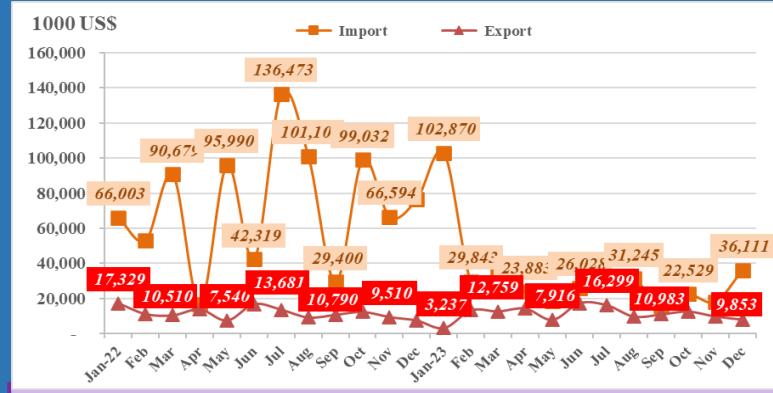


Figure 4: Monthly value of sugar import and export in 2022-2023

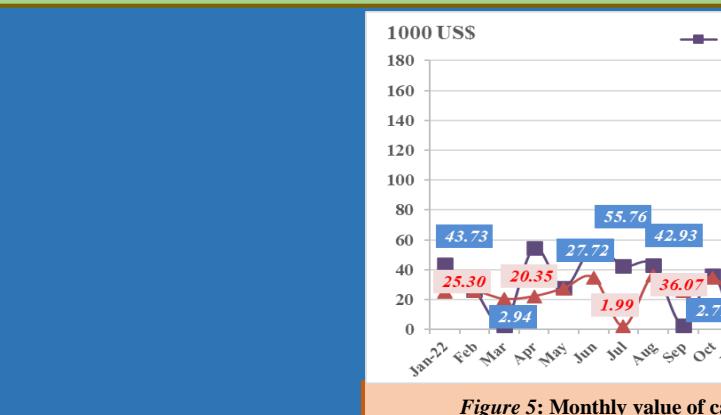


Figure 5: Monthly value of cassava import and export in 2021-2022





MYANMAR

Crop Situation in 2023 (P. 1/2)

The weather in Myanmar in 2023 (2022/2023) is generally aberrant. The areas have low rainfall with an average amount of 0.5-20 millimeters per day. There is a sufficient amount of sunlight and an irrigation system to contain water during dry season. With the effect of the climate change and global warming situation, some regions which were 1) Magwe and Rakhine faced drought, 2) Sagaing faced diseases, 3) Mandalay Kachin and Tanintharyi faced pests, 4) Rakhine faced overflow of saline water, and 5) Nay Pyi Taw, Ka Chin, Chin, Sagaing, Bago, Magwe, Mandalay, Mon, Yangon, Shan and Ayeyarwaddy **faced heavy rain**. These phenomena have affected to agricultural products in Myanmar. Thus, the Myanmar government helps alleviate the suffering of agriculture from the effects of climate change by supporting new technologies to farmers, and increasing channels for farmers to access to credit. Moreover, the government and farmers collaborate in water management to effectively reduce damage from natural disasters. Farmers also adjusted their cultivation plan or new planting times to suitable for changing in weather patterns and used good variety that are resistant to climate change and global warming for reducing the risk caused by climate change and global warming. However, farmers are still having some damaged areas caused by climate change and global warming situation. **In addition, the spread of COVID-19 does not affect** the production in the country. The import situations of rice, maize, and cassava are expected to increase for ensuring food security in the country. While the import of soybean is expected to decrease as the production of soybean is already sufficient for the domestic consumption. In the meantime, the export of maize, soybean, and sugar are expected to decrease due to less order from international markets. While the export of rice and cassava are expected to increase because of higher productions of these crops and higher market demand. The production situation of five main crops are as follows.

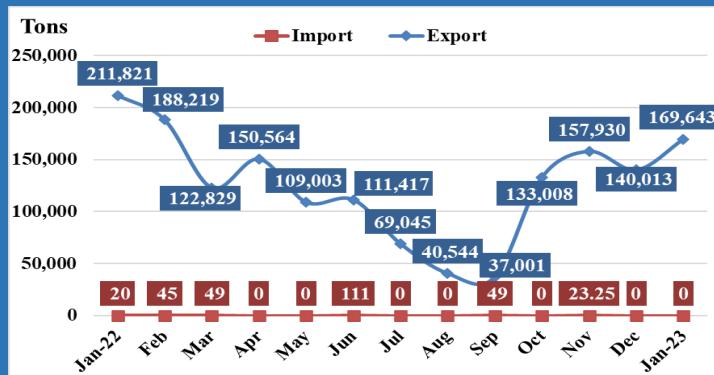


Figure 1: Monthly quantity of rice import and export in 2022-2023

For maize, the planted area and production are forecast to decline due to the increasing prices of agricultural inputs, especially seeds and fertilizers together with unfavorable weather caused by the aberrant weather resulted in flood. The damage of the planted areas are around 838.93 hectares. **The harvesting period of maize in 2023** is from August 2022 to December 2022 for wet season, and from January 2023 to June 2023 for the dry season.

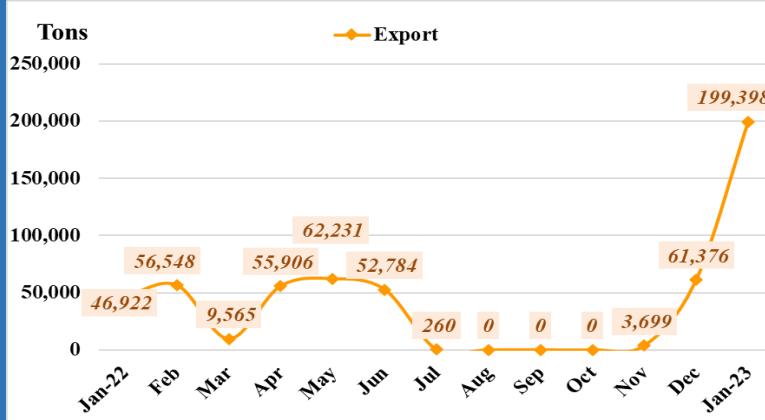


Figure 3: Monthly quantity of sugar export in 2022-2023

For rice, the planted area and production declined due to unfavorable weather and the increasing prices of agricultural inputs such as seeds and fertilizers, etc. Moreover, the aberrant weather caused by the decreasing of natural resources in the country resulted in flood. Consequently, the planted areas were damaged around 4,582 hectares which resulted in declining in its harvested area. **The harvesting period of rice in 2023** is from August 2022 to February 2023 for the wet season, and from February 2023 to August 2023 for the dry season.

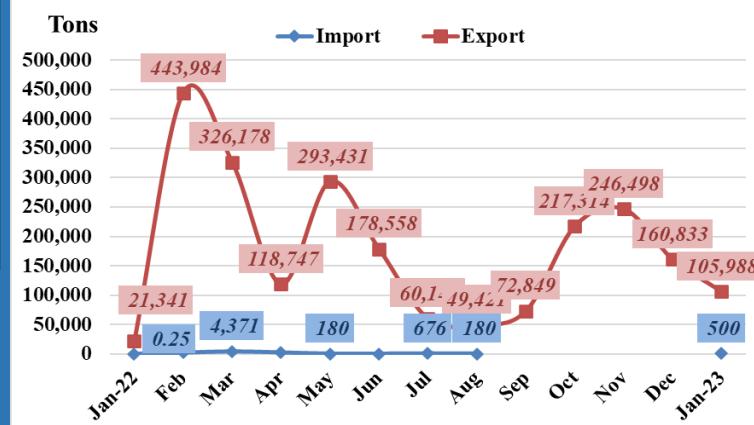
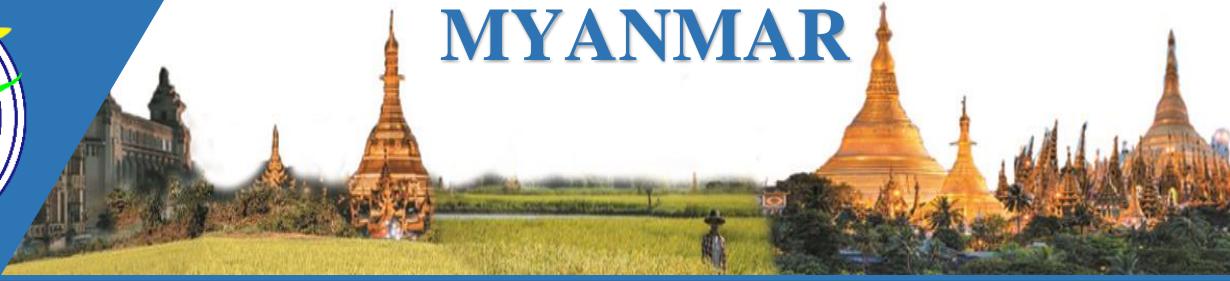


Figure 2: Monthly quantity of maize import and export in 2022-2023

For sugarcane, the planted area declined due to the increasing prices of agricultural inputs, especially seeds and fertilizers together with unfavorable weather. **The harvesting period of sugarcane in 2023** is from October 2022 to March 2023.



MYANMAR



Crop Situation in 2023 (P. 2/2)

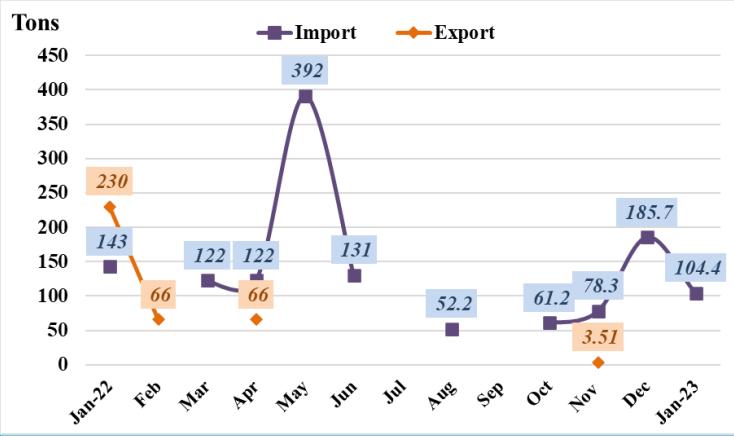


Figure 4: Monthly quantity of soybean import and export in 2022-2023

For soybean, the planted area is estimated to increase from last year due to the rising soybean price and favorable weather with sufficient sunlight for cultivating crops. **The harvesting period of soybean in 2023** is from August 2022 to January 2023 for wet season, and from December 2022 to May 2023 for the dry season.

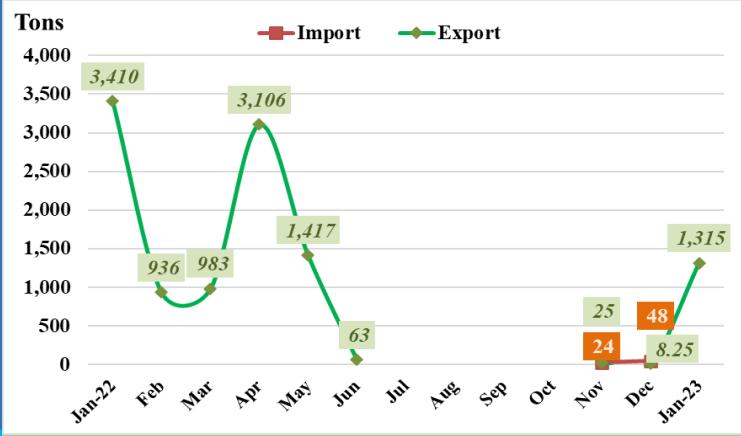
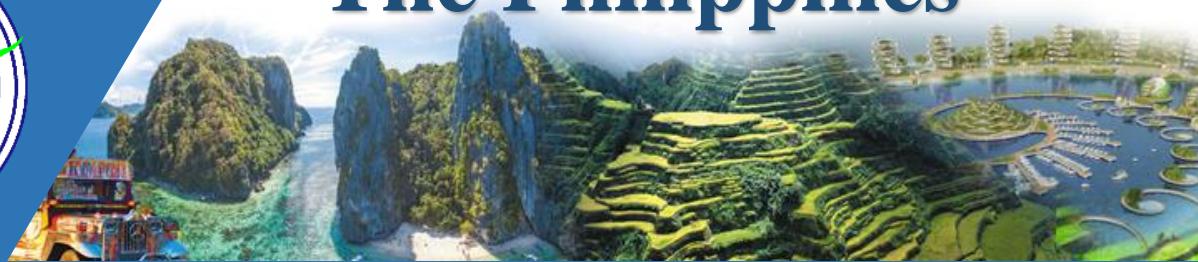


Figure 5: Monthly quantity of cassava import and export in 2022-2023

For cassava, the planted area declined due to the increasing prices of agricultural inputs such as seeds and fertilizers, etc. **The harvesting period of cassava in 2023** is between September 2022 and June 2023.



The Philippines



Crop Situation in 2023 (P.1/2)

The crop conditions of the Philippines in 2023 (2022/23) have natural disasters in the country which was hit by Super Typhoon Henry (August 2022), Super Typhoon Karding (September 2022), Tropical Depression Maymay, Typhoon Neneng and Severe Tropical Storm Paeng (October 2022), Typhoon Quenie (November 2022), Northeast Monsoon and shearline (December 2022 to February 2023). These typhoon storms and Monsoon caused damaged area in many provinces which were Luzon, Cagayan Valley, MIMAROPA, Bicol Region, Western Visayas, Central Visayas, Eastern Visayas, Zamboanga Peninsula, Palawan, Northern Mindanao and Caraga. The effect of damage from natural disasters are caused by strong wind, heavy rainfall which has a volume of 100 – 150 millimeter per day. However, the number of total damaged area of crop have not reported yet because the crop situations of rice, maize, cassava, sugarcane and soybean cannot be assessed in this time. While climate change and global warming have not affected the agricultural products of the country. With regard to the spread of COVID-19, it is great to hear that the situation of import-export crop production and food security of the Philippines is not affected by COVID-19. The situation of main crops are as follows.

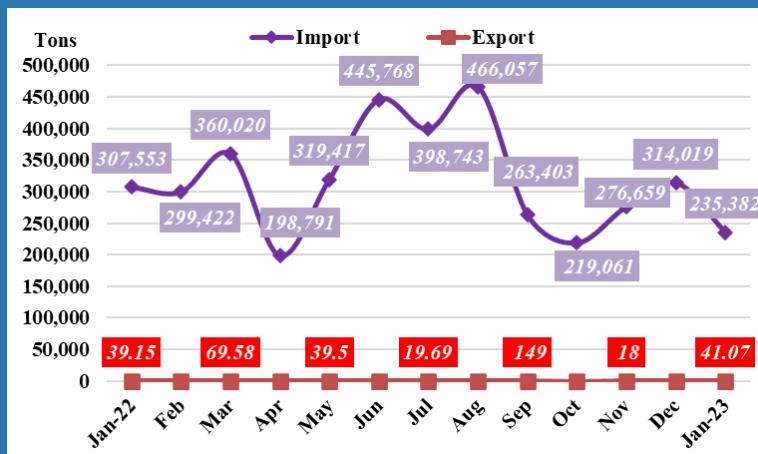


Figure 1: Monthly quantity of rice import and export in 2022-2023

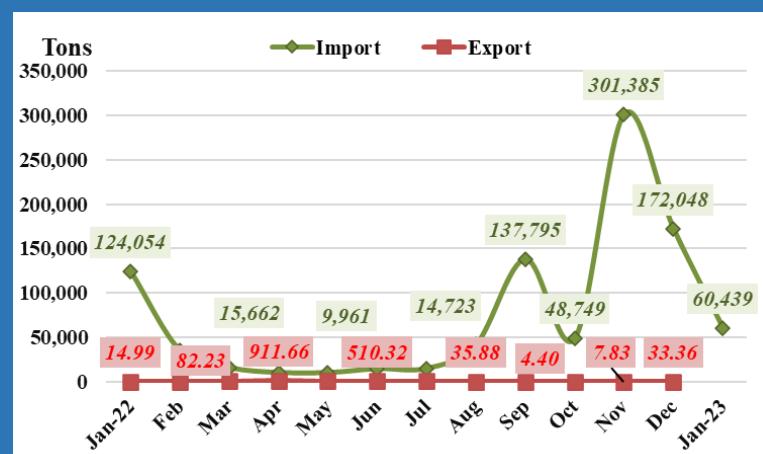
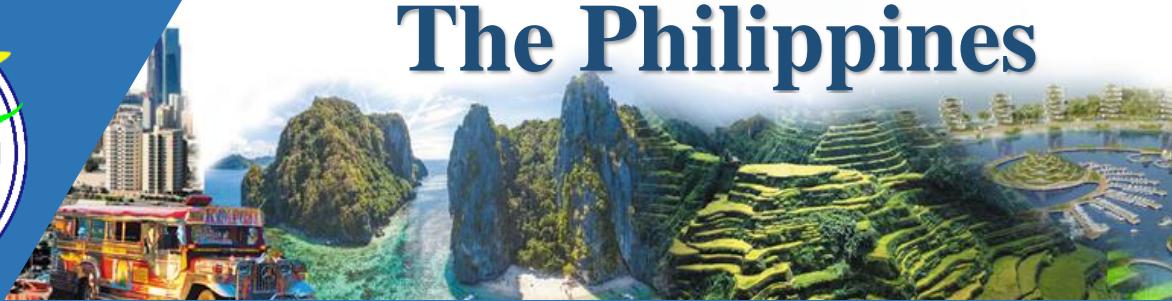


Figure 2: Monthly quantity of maize import and export in 2022-2023

For rice, the harvested area and yield are estimated to decrease. The decreasing in the harvested area is due to unfavorable weather (frequent rainfall), diseases and pests (rat infestations and stemborer). Besides, the declining in yield is because farmers apply less fertilizers in the area due to high cost of fertilizers. **The harvesting period of rice in 2023** is from July 2022 to December 2022 for wet season, and January 2023 to June 2023 for dry season.

For Maize, the production is estimated to decrease due to unfavorable weather impacted by Typhoons Maymay, Neneng, and Paeng during cultivation period. Moreover, farmers applied less fertilizers to their crops due to high cost of fertilizers and some corn farms were converted to residential, commercial areas and diversion roads. **The harvesting period of Maize in 2023** is from July 2022 to December 2022 for wet season, and January 2023 to June 2023 for dry season.



Crop Situation in 2023 (P.2/2)

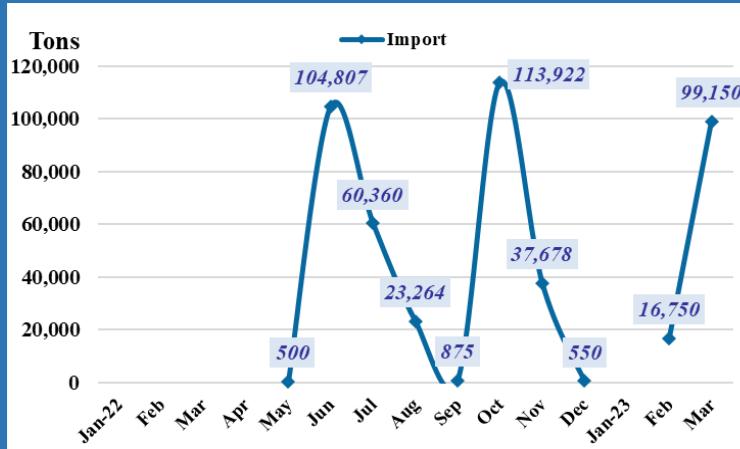


Figure 3: Monthly quantity of sugar import in 2022-2023

For Soybean and Cassava, the crops' situations are not available. The harvesting period of Soybean in 2023 is from July 2022 to December 2022 for wet season. The harvesting period of Cassava in 2023 is from July 2022 to December 2022 for the 1st crop.

For Sugarcane, the production area is predicted to increase because farmers respond to the increasing price of sugarcane by using more fertilizer and timely application of fertilizer. The harvesting period of sugarcane in 2023 is from September 2022 to August 2023.

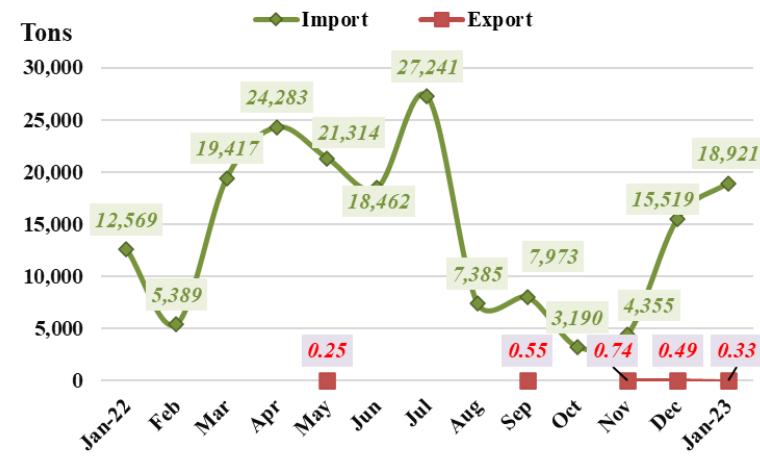


Figure 4: Monthly quantity of soybean import and export in 2022-2023

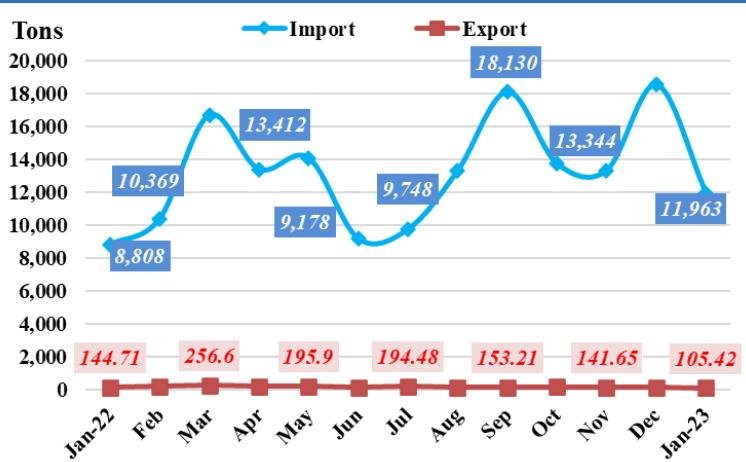


Figure 5: Monthly quantity of cassava import and export in 2022-2023



THAILAND



Crop Situation in 2023 (P.1/2)

The weather in Thailand in 2024 (2023/2024) compared to 2023 (2022/2023) has good conditions. With a sufficient sunlight for the plants, and sufficient amount of water supply which allows the farmers to use water per crops' need, farmers are capable to cultivate crops for the whole year. The amount of rain ranges from 20 to 50 millimeters per day. **The spread of COVID-19**, it does not affect the agricultural production as the production begins to come back to a normal state in order to provide enough for the domestic consumption and maintain food security. Moreover, agricultural products in Thailand have been affected by climate change and global warming situations. These climate change and global warming situations that have been occurred in Thailand were extreme drought conditions (El Nino) occur during the year. Some farmers have adjusted their planting plans or new planting times to suitable for changing in weather patterns, while some farmers have limitations in adapting to climate change because they are still having problems with access to water resources caused by insufficient water allocation in some areas. As a result, they have still had some damaged areas affected by these climate change and global warming situations.

In terms of importing situation in 2023, the import of maize is expected to increase because domestic production is not enough to meet the demand of the animal feed industry. **The import of soybean is also expected to increase** because the domestic production is insufficient to meet the demand of entrepreneurs in food product processing caused by the increasing demand for healthy food. **In addition, the cassava import becomes greater because of the insufficient domestic production and the increase in demands** from factories which aims to process cassava for importing purpose. As a result, cassava was imported from neighboring countries, mostly from Cambodia and Lao PDR to process/collect/improve quality and then export to the international market. **On the contrary, the import of sugar is forecast to decrease** due to the rising in the domestic production that is sufficient to meet domestic demand and export. **For the export situation in 2023**, the exports of rice, sugarcane, soybean and cassava become greater than the previous year. **The increase in rice export** is because the demand for rice in the world market is increase and the trading partner countries have increased purchasing power after the world economic recovery from the COVID-19 pandemic and Russia-Ukraine war. In addition, the price of Thai rice is still at a competitive level compared with the competitive countries. **The increase in soybean export** is due to the increasing demand for soybean and Thai soybean products from neighboring countries. **The increase in sugar export** is due to the increasing of domestic production and the increasing demand of sugar from Southeast Asia countries. **Besides, the increase in cassava export** is because the demand of Thai cassava products from trading partner countries, especially China is continuously increased as alternative raw materials for animal feed industry. **On the other hand, the export of maize is forecast to decline** because the domestic demand of maize for the animal feed industry has increased resulted in the decreasing maize export to the Asia markets such as the Philippines, Hong Kong, Indonesia, and Japan.

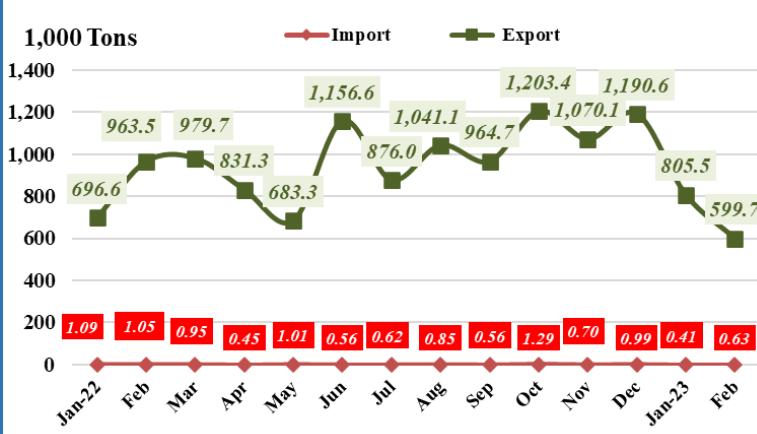


Figure 1: Monthly quantity of rice import and export in 2022-2023



Figure 2: Monthly quantity of maize import and export in 2022-2023

Rice production in 2024 (the crop year 2023/24) is predicted to increase due to the increase in planted area and yield resulting from the favorable weather together with sufficient water supply. Moreover, the expansion of planted area of rice is because farmers respond to price increase. **The harvesting period of rice in 2024** is from August 2023 to April 2024 for wet season, and February 2024 to October 2024 for dry season.



THAILAND

Crop Situation in 2023 (P.2/2)

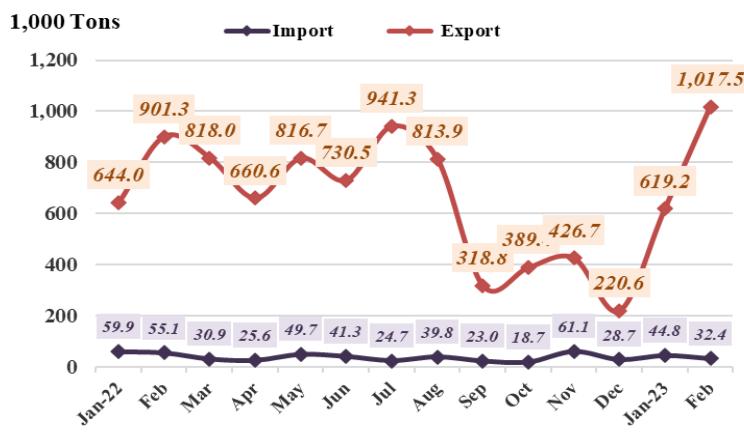


Figure 3: Monthly quantity of sugar import and export in 2022-2023

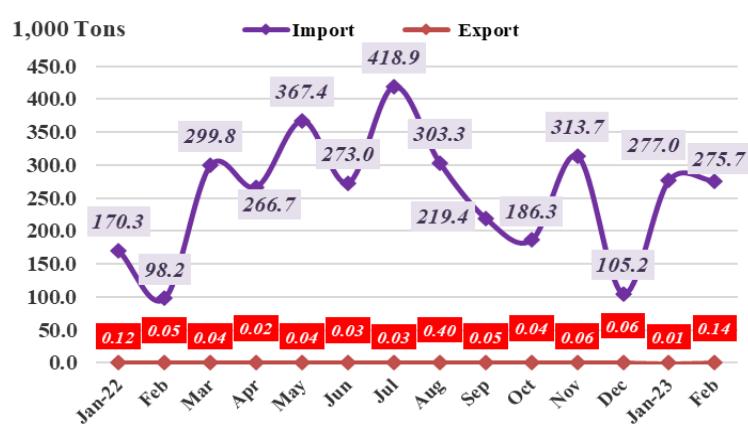


Figure 4: Monthly quantity of soybean import and export in 2022-2023

The production of maize in 2024 (the crop year 2023/24) is forecast to increase due to the increase in yield resulting from better taking care of the crops by farmers and applying new techniques to reduce diseases and pests. However, the planted area of maize is estimated to decrease due to the increasing prices of agricultural inputs such as fertilizer, insecticide and fuel. **The harvesting period of maize in 2024** is from June 2023 to February 2024 for wet season, and February 2024 to May 2024.

For sugarcane, the production in 2024 (the crop year 2023/24) is forecast to increase as the planted area and yield tend to increase resulting from the rising sugarcane price and better taking care of the crops by farmers together with favorable weather. **The harvesting period of sugarcane in 2024** is from December 2023 to April 2024.

The production of soybean in 2024 (the crop year 2023/24) is forecast to decrease as the planted area tends to decrease from the last year due to labor shortage, seed shortage, high production costs, and lack of the development of mechanical soybean harvesting technology. In addition, soybean is a plant that is difficult to maintain. Moreover, the net return for soybean cultivation is not worth the investment as a result farmers switched to plant other crops which give better net return such as rice, maize, green beans, vegetables and etc. **The harvesting period of soybean in 2024** is from July 2023 to December 2023 for wet season, and January 2024 to May 2024 for dry season.

The planted area and production of cassava in 2024 (the crop year 2023/24) are forecast to increase from last year because of declining prices of the competing crops and rising price of cassava which increases farmers' incentive to expand planted area of cassava. Farmers also take better care of their crops together with favorable weather resulting in higher production. **The harvesting period of cassava in 2024** is from October 2023 to September 2024.

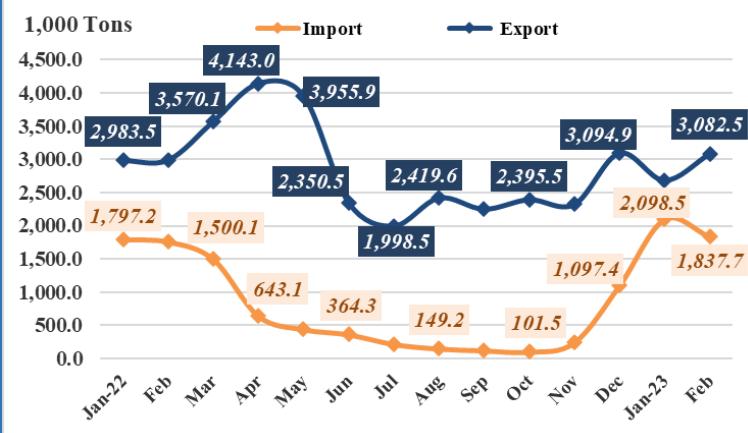


Figure 5: Monthly quantity of cassava import and export in 2022-2023



VIETNAM



Crop Situation in 2023 (P.1/2)

The weather condition, impact of climate change or global warming and COVID-19 on crop production, and trade of Vietnam in 2023. In the first three months of 2023, the weather conditions are quite favorable for agricultural production in Vietnam. The planted area of winter-spring rice is estimated to decrease in the first quarter of 2023 mainly due to the conversion of land use purposes to sectors with higher economic values. The cost of rice production decreases due to lower costs of fertilizers and pesticides, thanks to the reopening of China's economy after a prolonged COVID-19 lockdown. Export values of Vietnam's agricultural sector are estimated to decline in the first 3 months of 2023 due to difficulties in exporting some key commodities. Similarly, Vietnam's import value of agricultural sector is also estimated to decrease.

Rice: Vietnam's dry rice production in 2023 will be higher than in 2022 due to favorable weather conditions and better irrigation preparation. However, the cultivated area decreased due to the conversion of land use purposes to urbanization or to the planting of other crops with higher economic value productivity. Besides, the prices of fertilizers and pesticides tend to decrease when China opens up after the COVID-19 pandemic, which helps reduce the cost of rice production. Regarding trade, the domestic selling price of rice as well as the export price continuously increased in the first 3 months of 2023, which predicts that Vietnam's rice exports in 2023 will increase in both volume and value.

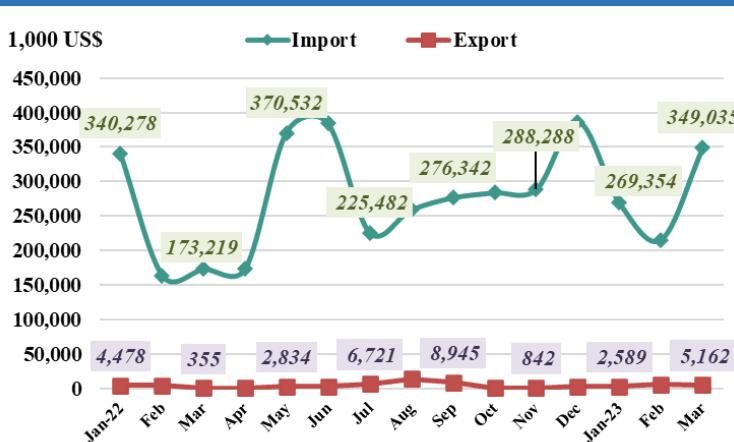


Figure 2: Monthly value of maize import and export in 2022-2023

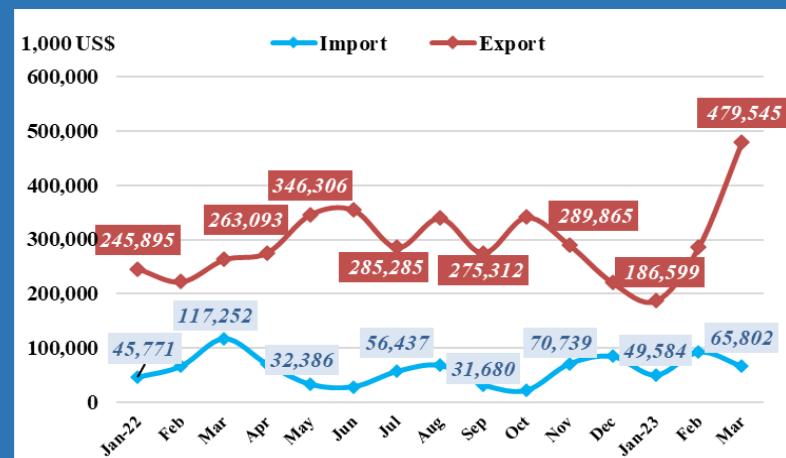


Figure 1: Monthly value of rice import and export in 2022-2023

Maize and soybean: In the first months of 2023, input costs of production decreased due to the opening of China's economy after the COVID-19 pandemic (imported fertilizer prices decreased by 31% compared to the same period in 2022). Lower input costs have had a major impact on maize and soybean acreage. The area of maize and soybean in the 2023 winter-spring crop is estimated to increase compared to the 2022 crop. Imports of maize and soybeans in the first two months of 2023 decreased in both volume and value. In which, the import volume of maize was 1.42 million tons, down 9.6%; the import value reached 477.7 million USD, down 5.3%. Soybean import volume was 301.9 thousand tons, down 18.9%; import value was 213.3 million USD, down 7.1%.

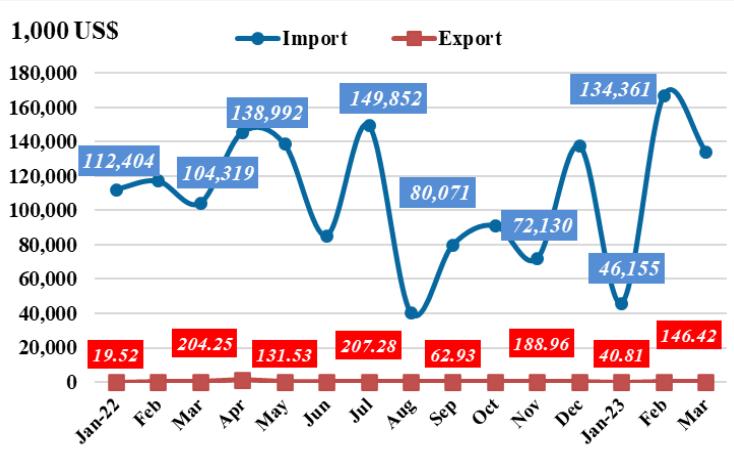


Figure 3: Monthly value of soybean import and export in 2022-2023

For sugarcane: According to the Vietnam Sugarcane Association (VSSA), both planted area and output are forecast to increase in the 2022-2023 crop year. The domestic price of sugarcane is also expected to increase. This is because after applying measures to combat trade remedy evasion for some sugarcane products imported from ASEAN countries, the amount of sugar imported into Vietnam has decreased remarkably. After the imposition of the anti-dumping tax, the price of smuggled sugar will be about 15% higher than the domestic sugar price. Therefore, the new tax rate will create a competitive advantage for domestic sugarcane. The export value of Vietnam's sugar in the first 3 months of 2023 is estimated to increase considerably by 34.4% compared to the same period in 2022, while the import value is estimated to decrease by 31%.





VIETNAM

Crop Situation in 2023 (P.2/2)

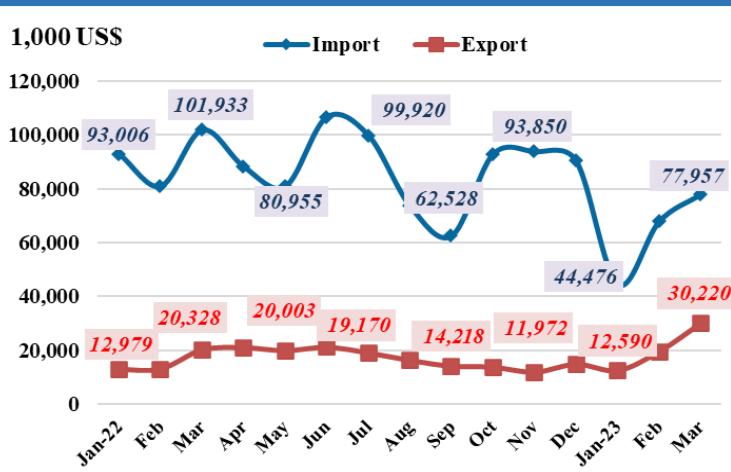


Figure 4: Monthly value of sugar import and export in 2022-2023

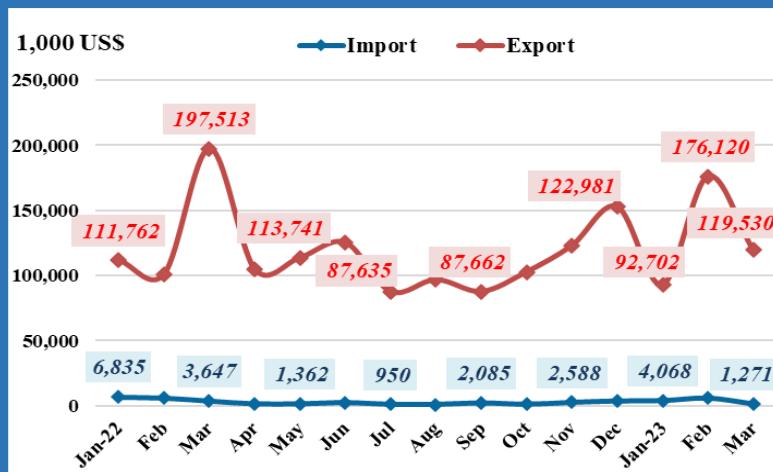


Figure 5: Monthly value of cassava import and export in 2022-2023

For cassava: The cultivation area of cassava in the crop year 2022-2023 is estimated to decrease. Cassava yield is also not high because of leaf mosaic disease. The price of fresh cassava is currently increasing due to the shortage of raw materials. Factories will have to end the production season about 1 month earlier than every year because of the lack of input materials. In the first 3 months of 2023, the export value of Vietnam's cassava is estimated to decrease by 5.5% compared to the same period in 2022. Vietnam's import value of cassava during this period is also estimated to decline by 30.3%.



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