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Rice Outlook

Nathan W. Childs, coordinator

In this report:

Rice Outlook monthly tables, in Excel format, can be found on the Rice Outlook report page on USDA's Economic Research Service website.

U.S. 2021/22 Rice Plantings Indicated at 2.71 Million Acres

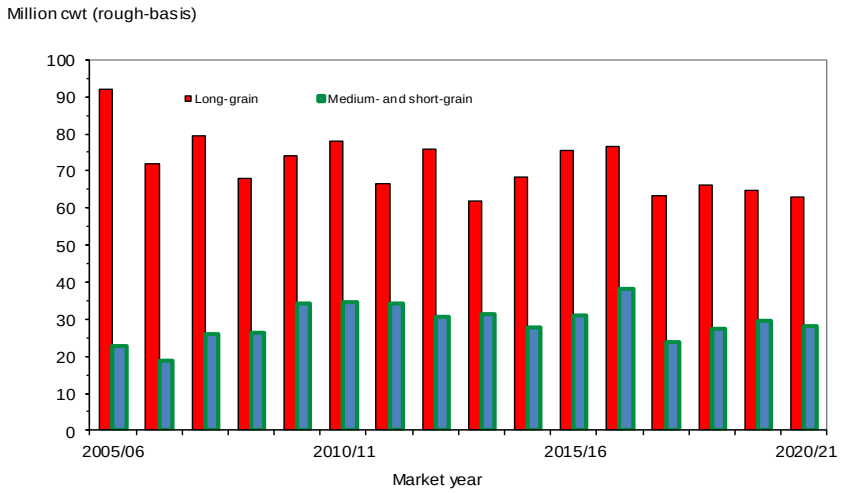
The first survey-based indication of 2021/22 U.S. rice acreage puts plantings at 2.71 million acres, down 11 percent from a year earlier, with plantings indicated lower for both classes of rice. For 2020/21, all-rice imports were lowered 0.5 million hundredweight (cwt) to 35.7 million, with long-grain accounting for all of the reduction. On the use side, total exports were lowered 2.0 million cwt to 91.0 million cwt, with long-grain accounting for all of the reduction. Total domestic and residual use was lowered 2.0 million cwt—all long-grain—to 158.0 million cwt, still the highest on record. The domestic and residual use reduction was largely based on data from the March 1 *Rice Stocks* and U.S. Census trade data indicating less domestic and residual use through February than previously estimated. These supply and use revisions resulted in a 3.5-million cwt increase in the 2020/21 ending stocks forecast to 42.95 million cwt. Season-average farm-price (SAFP) forecasts were raised this month for long-grain rice and combined medium- and short-grain rice in both regions, raising the all-rice SAFP 10 cents to 13.70 per cwt.

In the global rice market, production in 2020/21 is forecast at a record 504.2 million tons (milled basis), down 0.24 million tons from the previous forecast but up more than 1 percent from a year earlier. The largest upward revisions were made for Colombia, Ecuador, the Philippines, Senegal, and Thailand. These upward revisions were more than offset by crop reductions for Burma, Cuba, European Union (EU), Japan, and Uruguay. Global rice consumption and residual use in 2020/21 is projected at a record 504.3 million tons, down 0.4 million tons from the previous forecast. Consumption and residual use forecasts were lowered for Burma, Colombia, Saudi Arabia, the United States, and Taiwan, but raised for Peru, the Philippines, and Senegal. The global ending stocks forecast for 2020/21 was lowered 0.1 million tons to 177.7 million tons, down 0.14 million tons from a year earlier and the first decline in 14 years.

Global rice trade in calendar year 2021 is projected at 46.0 million tons (milled basis), down almost 0.2 million tons from the previous forecast but 2 percent larger than a year earlier. This month, export forecasts were lowered for Burma, Ecuador, the United States, and Uruguay. Import forecasts for 2021 were lowered for the Philippines, United Arab Emirates, Colombia, Peru, Senegal, and the United States. Thailand's trading prices were quoted 5-6 percent lower than a month earlier. Vietnam's price quotes dropped about 4 percent over the past month. U.S. long-grain milled-rice prices remained unchanged from a month earlier, while U.S. California medium-grain prices rose.

Approved by USDA's World Agricultural Outlook Board

Figure 1
U.S. long-grain rice exports are projected to decrease in 2020/21 for a second consecutive year 1/



Cwt = Hundredweight. 2020/21 are forecasts.
1/ Milled and brown rice exports converted to a rough-rice basis.
Sources: USDA, Economic Research Service, 2005/06-2017/18 Rice Yearbook Data Set; USDA, World Agricultural Outlook Board, 2018/19-2020/21 World Agricultural Supply and Demand Estimates.

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Domestic Outlook

U.S. 2021/22 Rice Plantings Indicated at 2.71 Million Acres

In March, U.S. rice growers indicated they intend to plant 2.71 million acres of rice in 2021/22, down 11 percent from a year earlier but quite close to the level forecasted by USDA at the February 2021 U.S. Agricultural Outlook Forum. Long-grain plantings were indicated at 2.078 million acres, down 11 percent from a year earlier but slightly above trade expectations. Combined medium- and short-grain plantings were indicated at 632,000 acres, 10 percent below a year earlier and the lowest since 2008/09. Medium- and short-grain plantings were indicated to be below a year earlier in both California and the South, with the southern-indicated plantings of 169,000 acres the lowest since 2013/14 and the second consecutive year of a decline. Medium- and short-grain indicated plantings are about 10 below the level presented in February, mostly due to smaller-than-expected indicated plantings in California.

The indented plantings are based on a survey of growers conducted during the first 2 weeks of March. The first survey of actual plantings will be conducted during the first 2 weeks of June and will be reported in USDA's National Agricultural Statistics Service's (NASS) *Acreage* report to be released on June 30, 2021. Actual plantings often differ from intended plantings due to weather and price developments.

In the Delta, the largest U.S. growing region, Arkansas growers indicated 2021/22 rice-planted acreage at 1.25 million acres, down more than 14 percent from a year earlier. Long-grain acreage in Arkansas was indicated at 1.13 million acres, a 15-percent drop from a year earlier. Combined medium- and short-grain acreage in Arkansas was indicated at 121,000 acres, down 11 percent from 2020/21 and the lowest since 2013/14. Mississippi growers indicated 2021/22 rice plantings at 120,000 acres—all long-grain—down 28 percent from a year earlier. In Missouri, growers indicated total rice plantings at 233,000 acres, up 2 percent from a year earlier. Long-grain accounts for most of Missouri's rice area and all of the indicated increase in 2021/22. The overall decline in rice acreage in the Delta is largely due to stronger prices for soybeans and corn this winter, the main alternative crops in the region.

On the Gulf Coast, Louisiana growers indicated 2021/22 plantings at 445,000 acres, down 7 percent from a year earlier. Long-grain plantings in Louisiana were indicated at 410,000 acres, down almost 5 percent from a year earlier, likely due to greater competition from corn and soybeans, especially in the northeast. Combined medium- and short-grain plantings in Louisiana were indicated at 35,000 acres, a 30-percent decline from a year earlier. Arkansas and Louisiana produce most of the southern medium- and short-grain rice. Since 2019/20, international demand for southern medium- and short-grain rice has been very weak, a major factor behind the declining area in the region. In Texas, growers indicated 2021/22 plantings of 190,000 acres, up more than 3 percent from a year earlier. Long-grain accounts for almost all of the intended area expansion in Texas and the bulk of the State's rice production. Unlike much of the Delta, neither corn nor soybeans are typically rotated with rice in Texas.

In California, growers indicated rice plantings of just 471,000 acres, a decline of 9 percent from a year earlier, primarily due to a lack of available irrigation water. On April 1, the unofficial end of California's wet season, State officials announced that the accumulation of snow in the Sierra Nevada mountains and in the Cascades was about 40 percent below average levels, indicating that the State didn't receive enough snow and rain to replenish its groundwater supplies, feed its rivers and streams, or fill depleted reservoirs. The two big reservoirs—Shasta and Oroville—are currently reported at 53 percent and 41 percent of capacity, respectively. Medium- and short-

grain account for the bulk of the State's rice acreage, with long-grain plantings indicated at 8,000 acres, down 4,000 from 2020/21.

Planting of the 20221/22 U.S. rice crop began in mid-March on parts of the Gulf Coast. For the week ending April 4, 14 percent of the U.S. rice crop was reported planted, 2 percentage points behind a year earlier and 4 percentage points behind the U.S. 5-year average. Planting was most advanced on the Gulf Coast, as expected, with the Louisiana crop reported 61 percent planted, 6 percentage points behind a year earlier and 2 percentage points behind the State's 5-year average. The Texas 2021/22 rice crop was reported 59 percent planted by April 4, behind 71 percent reported planted a year earlier but 8 percentage points ahead of the Texas 5-year average.

In the Delta, 3 percent of the Mississippi 2021/22 crop was reported planted by April 4, up 1 percent from a year earlier but well behind the State's 5 year-average of 9 percent. Arkansas' crop was reported 2 percent planted by April 4, also up 1 percentage point from a year earlier and well behind the State's 5-year average of 9 percent. Planting has not yet begun in Missouri or California. Planting in Missouri typically begins in mid-April and California planting typically begins in late April.

For the week ending April 4, 8 percent of the U.S. rice crop had emerged, down 1 percentage point from a year earlier but unchanged from the U.S. 5-year average. In Louisiana, 36 percent of the rice crop was reported emerged by April 4, down 6 percentage points from a year earlier and 1 percentage point behind the State's 5-year average. The Texas rice crop was reported 32 percent emerged, behind 40 percent reported a year earlier but well ahead of the State average of 23 percent. Rice had not yet emerged in the remaining rice growing States.

U.S. 2020/21 Rice Import Forecast Lowered

The only supply-side revision this month to the 2020/21 U.S. all-rice balance sheet was a 0.5-million cwt reduction in the all-rice import forecast to 35.7 million cwt, 4 percent smaller than the year-earlier record but still the second highest.

Long-grain accounted for all of this month's downward revision in imports. At 29.0 million cwt, long-grain imports are 0.5 million cwt below the previous forecast and almost 3 percent smaller than the year-earlier record. This month's downward revision is based on Census reported imports through February and expectations regarding imports the remainder of the market year. Through February 2021, the United States had imported almost 520,000 tons (product-weight) of long-grain rice, up more than 9 percent from a year earlier. However, in 2019/20, the United States imported record or near-record quantities of rice from March through July, exceeding 100,000 tons in some months. However, U.S. long-grain imports have slowed since August from these record and near-record levels, particularly in January and February. The record import levels reported last Spring and Summer—which coincided with the beginning of National lock-down over the COVID-19 pandemic—are not expected to return this Spring and Summer.

In February, the U.S. imported 57,939 tons of long-grain rice, down 12 percent from a month earlier and the smallest in 12 months. Imports of basmati rice from India and Pakistan have accounted for the bulk of the slower monthly pace of U.S. long-grain rice imports since August, with India the larger supplier of basmati to the U.S. by a wide margin. Imports of Thai jasmine rice, the largest type of rice imported by the United States, have shown no sustained decline since the start of the 2020/21 market year and were actually up about 10 percent in February 2021 from August 2020.

U.S. medium- and short-grain imports remain forecast at 6.7 million cwt, more than 11 percent smaller than the year-earlier record. The decline is based on expectations of three shipments of 21,000 tons of rice from China arriving in Puerto Rico—a U.S. territory—in 2020/21, down from four shipments in 2019/20. The first shipment in 2020/21 arrived in November. The second is expected to be reported in the March U.S. Census based on recently reported China trade data. Since 2018/19, China has supplied three or four shipments of approximately 21,000 tons of rice to the United States each market year, all to Puerto Rico. Thailand and China are the largest suppliers of medium- and short-grain rice to the United States, with Thailand's shipments mostly specialty rice classified as medium- and short-grain. India is now the third-largest supplier, followed by much smaller shipments from Italy and a few South American suppliers.

U.S. 2020/21 All-Rice Export Forecast Lowered Again, This Month by 2.0 Million Cwt

There were two revisions on the use-side of the 2020/21 U.S. rice balance sheet this month. First, exports were again lowered, this month by 2.0-million cwt to 91.0 million cwt, more than 3 percent below a year earlier and the fifth consecutive month of a downward export revision. The reduction was again only for long-grain and was largely based on Census-reported monthly shipments through February, weekly shipments and sales through April 1 reported in the *U.S Export Sales*, and expectations regarding shipments and sales the remainder of the market year. Through February, the U.S. Census Bureau reported total shipments of all-rice of about 1.94 million tons (product-weight), down 7 percent from a year earlier.

Long-grain exports are projected at 63.0 million cwt, 2.0 million less than the previous forecast and 2.5 percent below a year earlier and the smallest since 2013/14. Sales to several traditional Latin American buyers—especially Colombia, Haiti, and Mexico—remain well behind their year-earlier pace. Mexico is the largest market for U.S. long-grain rice, taking mostly rough-rice, and Haiti is the largest market for U.S. long-grain milled rice. The United States has shipped 120,200 tons of long-grain rough rice to Brazil in 2020/21, with no current outstanding sales to Brazil be shipped. Brazil is not a typical buyer of U.S. rice. In addition, through April 1, the United States had shipped or sold a total of 214,000 tons of long-grain rough-rice to Venezuela, well ahead of 54,600 tons a year earlier. In contrast, U.S. long-grain shipments to the Middle East are well behind a year earlier, mostly due to lack of any sales to Iraq thus far in 2020/21.

U.S. medium- and short-grain rice exports in 2020/21 remain projected at 28.0 million cwt, down 5 percent from a year earlier. The United States is expected to make few--if any--sales beyond its regular sales to Japan, South Korea, and Taiwan as part of each importer's World Trade Organization commitments and its smaller regular sales to Jordan, Canada, and Mexico. California is expected to again account for the bulk of U.S. medium- and short-grain exports, with any exports from the U.S. South again expected to be very small.

By type, U.S. rough-rice exports are projected at 34.0 million cwt, down 1.0 million cwt from the previous forecast but 9 percent above 2019/20. Sales to number one U.S. rough-rice buyer Mexico remain well behind a year earlier. The year-to-year increase is based on much larger U.S. supplies and more competitive U.S. prices, with Brazil and Venezuela accounting for most of the increase. Almost all of the rough rice exported is expected to be sold to Latin American buyers, primarily to Mexico and countries in Central and northern South America. The bulk of these shipments will be long-grain rice.

U.S. milled-rice exports in 2020/21 are projected at 57.0 million cwt, down another 1.0 million cwt from the previous forecast, 9.5 percent below a year ago and the smallest since 1975/76. Sales to Haiti, the largest export market for U.S. long-grain milled rice, remain well behind the year-earlier pace. Iraq has yet to purchase any U.S. rice in 2020/21 as the U.S. continues to be uncompetitive in Iraq's import tenders. Northeast Asia and Haiti are expected to remain the largest commercial markets for U.S. milled rice.

Total domestic and residual use of rice in 2020/21 is projected at a record 158.0 million cwt, down 2.0 million from the previous forecast but more than 9 percent larger than a year earlier. This month's downward revision is primarily based on the implied use from December through February indicated by the March 1 rice stocks reported by NASS and the U.S. trade data reported by Census. By class, long-grain domestic and residual use is forecast at a record 123.0 million cwt, down 2.0 million cwt from the previous forecast but more than 15 percent larger than a year earlier. Combined medium- and short-grain domestic and residual use remains projected at 35.0 million cwt, down 8 percent from a year earlier.

Based on data reported in the NASS March 1 *Rice Stocks*, total U.S. stocks of rice (rough- and milled-rice stocks converted to a rough basis) are estimated at 106.9 million cwt, up 14.1 percent from a year earlier. Long-grain stocks on March 1 are estimated at 71.3 million cwt, up more than 28 percent from a year earlier. At 31.6 million cwt, U.S. medium-grain stocks on March 1 were 6 percent below a year earlier, with medium-grain stocks up 6 percent in California but down 38 percent in the South, mostly a result of a smaller crop. Short-grain stocks on March 1 are estimated at 1.9 million cwt, up 10 percent from a year earlier. Most short-grain rice is grown in California. Stocks of broken kernel rice, not reported by class, are estimated at 2.0 million cwt, down 26 percent from a year earlier.

By State, Arkansas' March 1 rice stocks of 53.6 million cwt were up 15 percent from a year earlier. In Louisiana, rice stocks on March 1 were estimated at 8.3 million cwt, an increase of 56 percent from a year earlier. Mississippi's March 1 rice stocks of 3.2 million cwt were up 92 percent from a year earlier. At 5.5 million cwt, Missouri's March 1 rice stocks were up 18 percent from a year earlier. California's March 1 rice stocks of 30.0 million cwt were 7 percent larger than a year earlier. In contrast, Texas' March 1 rice stocks of 4.4 million cwt were 22 percent below a year earlier.

The above supply and use projections yield a 2020/21 U.S. ending stocks forecast of 42.95 million cwt, up 3.5 million cwt from the previous forecast and 50 percent larger than the year-earlier abnormally low level. The 2020/21 U.S. rice stocks-to-use ratio of more than 17.2 percent is well above the abnormally low 12.0 percent in 2019/20. By class, long-grain ending stocks in 2020/21 are projected at 30.8 million cwt, up 3.5 million cwt from the previous forecast and 82 percent higher than in 2019/20. The long-grain stocks-to-use ratio is forecast at 16.5 percent, well above the abnormally low 9.9 percent a year earlier. Medium- and short-grain ending stocks remain projected at 11.1 million cwt, 4 percent larger than a year earlier. The medium- and short-grain stocks-to-use ratio remains projected at 17.7 percent, up from 15.9 percent a year earlier.

U.S. 2020/21 season-average farm-price forecasts (SAFP) were again raised this month for both long-grain and medium- and short-grain rice, primarily based on the NASS-reported monthly cash prices and marketings through February and expectations regarding prices and marketings the remainder of the market year. The long-grain 2020/21 U.S. SAFP forecast was raised 10 cents to $12.50 per cwt, up 50 cents from a year earlier despite much larger supplies. The 2020/21 southern medium- and short-grain SAFP is projected at $12.90 per cwt, up 10

cents from the previous forecast and up $1.30 from the 2019/20 SAFP. The year-to-year expected increase is likely due to a smaller crop in 2020/21 than a year earlier.

The California 2020/21 (October-September) medium- and short-grain SAFP is projected at $19.30 per cwt, up 30 cents from the previous forecast but $2.30 below the 2019/20 SAFP of $21.60. The U.S. medium- and short-grain 2020/21 SAFP is projected at $17.30 per cwt, up 30 cents from the previous forecast but 90 cents below the 2019/20 SAFP of $18.20. The 2020/21 all-rice SAFP is projected at $13.70 per cwt, up 10 cents from both the previous forecast and the 2019/20 all-rice SAFP. Except for California, rice SAFPs are reported on an August-July market year.

International Outlook

Rice Production Forecasts for 2020/21 Lowered for Burma and Indonesia, Raised for the Philippines and Thailand

Global rice production in 2020/21 is forecast at 504.2 million tons (milled basis), down 0.24 million tons from the previous forecast but up more than 1 percent from a year earlier and the highest on record. The largest upward production revisions were made this month for Colombia, Ecuador, the Philippines, Senegal, and Thailand, with smaller increases made for Iraq, Mexico, and Peru. These upward production revisions were more than offset by crop reductions for Burma, Cuba, EU, Guatemala, Indonesia, Japan, and Uruguay.

On an annual basis, Australia, Cambodia, China, Colombia, Cote d'Ivoire, India, Indonesia, Pakistan, the Philippines, Senegal, Sri Lanka, Thailand, and the United States account for the bulk of the projected production increase in 2020/21. In contrast, Afghanistan, Argentina, Bangladesh, Brazil, Burma, Egypt, Iraq, Japan, Madagascar, Nigeria, Paraguay, South Korea, Taiwan, and Venezuela are projected to harvest significantly weaker crops in 2020/21.

Global rice consumption and residual use in 2020/21 is projected to be a record 504.3 million tons, down 0.4 million tons from the previous forecast but 8.0 million tons larger than a year earlier. This month, consumption and residual use forecasts were lowered for Burma, Colombia, Saudi Arabia, the United States, and Taiwan, but raised for Peru, the Philippines, and Senegal. On an annual basis, China accounts for the bulk of the projected increase in global consumption and residual use in 2020/21, with total use expected to increase 3.8 million tons. Industrial and feed uses account for nearly all of China's projected increase in consumption and residual use in 2020/21. Bangladesh, EU, India, Nepal, the Philippines, Sri Lanka, Thailand, and the United States are also projected to increase consumption and residual use in 2020/21. In contrast, consumption and residual use is projected to decline in 2020/21 in Indonesia, Japan, South Korea, and Nigeria, with declines in both South Korea and Japan a result of long-term diet diversification and negligible population growth or a slow population decline.

This month, USDA lowered its global ending stocks forecast for 2020/21 by 0.1 million tons to 177.7 million tons, down 0.14 million tons from a year earlier and the first decline in 14 years. This month, USDA lowered its 2020/21 ending stocks forecasts for Burma, Indonesia, Iraq, Peru, Saudi Arabia, and Taiwan. In contrast, ending stocks forecasts were raised this month for Colombia, Ecuador, the Philippines, and the United States.

On an annual basis, ending stocks are projected to be smaller in 2020/21 than a year earlier in Argentina, Bangladesh, China, Egypt, EU, India, South Korea, Japan, Nigeria, Peru, Taiwan, and Vietnam. In contrast, ending stocks are projected to be larger in 2020/21 in Australia, Brazil, Colombia, Indonesia, Pakistan, the Philippines, Sri Lanka, Thailand, and the United States. The 2020/21 global stocks-to-use ratio is projected at 35.2 percent, down from 35.8 percent in 2019/20 and below the 2000/01 record of 37.1 percent.

Table A - Global rice production, selected monthly revisions and year-to-year changes, April 2021						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation and comments on year-to-year change or month-to-month revision
1,000 metric tons (milled basis)						
Rice production in 2020/21						
Burma	12,600	-400	-0.8	↓	↓	Production forecast was lowered based on information from the U.S. Agricultural Office in Rangoon reporting both a lower yield and smaller harvested area due to insufficient rainfall in 2020 that has impacted both the main (or wet season) crop and the second (or dry season) crop. Total rice harvested area for 2020/21 was lowered 0.15 million hectares to 6.9 million, unchanged from 2019/20. The 2020/21 average yield forecast was lowered 1 percent to 2.85 tons per hectare, down almost 1 percent from a year earlier.
Colombia	2,010	110	14.9	↑	↑	Production forecast was raised to a record-high due to expanded area. At 595,000 hectares, rice harvested area in Colombia is up 35,000 hectares from the previous forecast, more than 14 percent larger than a year earlier and the highest on record. The increase in harvested area, along with favorable weather conditions and use of improved technology, supported the record crop. A domestic price surge at the beginning of 2020 driven by a strong U.S. dollar against the Colombian peso, high international rice prices, and temporarily stronger domestic demand due to COVID-19 panic-buying encouraged growers to expand area, primarily in the eastern plains. The average yield of 4.97 tons per hectare is fractionally above a year earlier but still below-record. Much of the analysis was provided by the U.S. Agricultural Office in Bogota.
Cuba	240	-15	-2.8	↓	↓	Production forecast was lowered due to reduced area estimates for both the minor-season crop (June-December) and the main-season crop (November-June) due to excessive rainfall in early November 2020. The excessive rainfall negatively impacted ripening of the minor-season crop and delayed planting of the main-season crop. At 107,000 hectares, total rice-harvested area in Cuba in 2020/21 is down 7,000 hectares from the previous estimate and is the smallest since 1993/94. Total production is the smallest since 2005/06.
Ecuador	1,023	150	10.0	↑	↑	Production forecast was raised to a near-record high based on a 15,000-hectare increase in the harvested-area estimate to 330,000 hectares and a 12-percent increase in the average yield to 4.92 tons per hectare. The yield is unchanged from the year-earlier revised record. The 2020/21 rice crop benefited from favorable weather conditions and improved income expectations for planting rice compared to other alternative crops. Much of the analysis was based on data from the U.S. Agricultural Office in Quito.
EU	1,962	-13	-1.2	↓	↓	The slight decrease in the EU production estimate is based on reduced crop estimates for France, Italy, Portugal, and Romania more than offsetting higher estimates for Greece and Hungary. Revisions were based on data provided by the U.S. Agricultural Office in Brussels.
Guatemala	16	-2	-15.8	↓	↓	Production forecast was lowered due reduced harvested area caused by damage from Hurricanes Ita and Iota, which struck Central America in November 2020. Harvested area was lowered 1,000 hectares to 4,000 hectares, down 20 percent from a year earlier and the lowest in more than 60 years.
Indonesia	35,200	-300	1.4	↓	↑	Production forecast was lowered based on information from the U.S. Agricultural Office in Jakarta reporting a lower average yield for the 2020/21 rice crop, a result of heavy rainfall that led to an abnormal number of cloudy days during the critical flowering and grain-filling stages that resulted in some empty husks and high moisture content of harvested rice. In addition, some rice farmers did not receive their allocated fertilizer on time, resulting in fewer applications. The 2020/21 average yield forecast was lowered almost 1 percent to 4.70 tons per hectare, fractionally below a year earlier. Harvested area remains estimated at 11.8 million hectares, up 0.2 million hectares from 2019/20.
Iraq	305	39	-12.1	↑	↓	Raised production forecast to a near-record high based on a revised yield. At 4.58 tons per hectare, the 2020/21 average yield is up 15 percent from the previous forecast, but more than 3 percent below the year-earlier record. Crop conditions in both 2019/20 and 2020/21 were rated above average. At 100,000 hectares, rice-harvested area in Iraq is unchanged from the previous estimate but is 9 percent below a year earlier. The revisions are largely based on data from the U.S. Agricultural Office in Baghdad, which reflect the most recently released area, yield, and production data from the Government of Iraq.
Japan	7,567	-53	-0.6	↓	↓	Lowered the 2020/21 production estimate based on data from the U.S. Agricultural Office in Tokyo reporting smaller harvested area and a weaker yield. At 1.53 million hectares, rice-harvested area in Japan is down 2,000 hectares from the previous forecast and 0.6 percent below a year earlier, lower than any reported level since 1900. The average yield of 6.78 tons per hectare is fractionally below the previous forecast but unchanged from a year earlier.
Mexico	197	4	12.6	↑	↑	Rice production was raised to the highest level since 2007/08 due a larger harvested-area estimate. Harvested area was raised 3,000 hectares to 47,000 hectares, mostly due to new subsidies that increased rice area in Campeche. Total rice-harvested area is the highest since 2009/10, while the average yield of 6.32 tons is more than 3 percent below a year earlier. Despite the production increase, Mexico is still expected to import almost 85 percent of its rice consumption.
Peru	2,260	50	2.3	↑	↑	Crop forecast was raised based on a larger area estimate and a higher average yield forecast. At 420,000 hectares, total harvested area is up 8,000 hectares from the previous forecast and up more than 1 percent from a year earlier. The average yield of 7.76 tons per hectare is up fractionally from the previous forecast and more than 1 percent larger than a year earlier. Data for this analysis came from the Peru Ministry of Agriculture, the United Nations Food and Agriculture Organization, and the U.S. Agricultural Office in Lima.
Philippines	12,400	200	4.0	↑	↑	The 2020/21 production forecast was raised to a record-high based on data reported in mid-March by the Philippine Statistical Authority (PSA), providing a preliminary estimate for January-March rice production of 4.58 million tons, up 8 percent from a year earlier. First-quarter 2021 harvested area was estimated at 1.15 million hectares, up 4.6 percent from a year earlier. The strong increase in rice production in the first quarter was largely due to favorable weather and expanded use of improved seed varieties. Total harvested area was raised 0.1 million hectares to 4.8 million, up 3.5 percent from a year earlier. The average yield of 4.10 tons per hectare is fractionally below the previous forecast, but the highest on record.
Senegal	891	102	13.4	↑	↑	Production forecast was revised up to a record high based on data from Senegal's Ministry of Agriculture showing a larger harvested area estimate. At 375,000 hectares, harvested area is up 75,000 hectares from the previous forecast and more than 8 percent larger than a year earlier and the highest on record. Rice harvested area in Senegal has almost tripled since 2014/15. The 2020/21 average yield forecast was lowered 8 percent to 3.49 tons per acre, still up nearly 5 percent from a year earlier.
Taiwan	900	-325	-22.7	↓	↓	The substantial drop in the production forecast is due to a severe lack of rainfall in late 2020 and extremely low reservoir levels, mostly due to a total absence of typhoons making landfall in 2020, for the first time since 1964. Rainfall has remained scant thus far in 2021. Currently, the major reservoirs in central and southern Taiwan hold less than 20 percent of their capacity level. Taiwan is expected to continue to have low levels of precipitation until at least June 2021, the start of the next typhoon season. The harvested-area estimate was lowered 68,000 hectares to just 200,000, lower than any level reported since 1900. Rice production in Taiwan is the smallest since the 1920s.
Thailand	18,830	230	6.7	↑	↑	Production forecast was raised based on information from the U.S. Agricultural Office in Bangkok indicating larger-than-expected dry-season harvested area. Through mid-March, rice acreage had expanded in the northeastern region by 57 percent, largely driven by recovery in reservoir water levels and attractive prices. Total dry-season production is currently forecast at 3.3 million tons, up more than 15 percent from the year-earlier drought-reduced level but still well below the 5.0-6.0 million tons typically harvested. Total harvested area for 2020/21 was raised almost 0.1 million hectares to nearly 10.4 million hectares, up 5 percent from a year earlier. The average yield of 2.74 tons per hectare is unchanged from the previous forecast but still below record.
Uruguay	858	-21	1.4	↓	↑	Lowered the 2020/21 production forecast based on data from the U.S. Agricultural Office in Buenos Aires indicating slightly lower harvested area and yield in Uruguay. During the planting season last fall, the weather was abnormally dry and several thousand hectares were not planted. The weather then normalized, with producers expecting record yields, but wet and cloudy weather in the first 2 weeks of February is expected to have adversely impacted yields. Both area and yield are fractionally below a year earlier.

Continued--

Table A - Global rice production, selected monthly revisions and year-to-year changes, April 2021--*continued*.						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation and comments on year-to-year change or month-to-month revision
Rice production in 2019/20						
Ecuador	930	60	0.5	↑	↑	Production forecast was raised based on a much higher yield estimate. At 4.92 tons per hectare, the 2019/20 average yield is the highest on record. In contrast, the 2019/20 area estimate was lowered 15,000 hectares to 300,000 hectares, down 9 percent from a year earlier. The area decline was primarily due to weaker farm prices.
EU	1,985	13	1.0	↑	↑	Small upward revision in EU rice production estimate is based on upward revisions in Italy's and Spain's production estimates more than offsetting a slight reduction in Romania's estimate.
Peru	2,200	-2	-10.4	↓	↓	Production estimate was lowered slightly due to a weaker average yield. Harvested area was actually raised 1,000 hectares to 415,000. Both area and yield are down more than 5 percent from a year earlier. Data are from the Peru Ministry of Agriculture, the U.S. Agricultural Office, and the United Nation's Food and Agriculture Organization.
Senegal	786	1	-4.3	↑	↓	Production estimate was raised fractionally due to a 43,000-hectare boost in harvested area to 346,000 hectares, up 7 percent from a year earlier. In contrast, the average yield was lowered 12 percent to 3.34 tons per hectare, 10 percent below a year earlier. The revised data are from Senegal's Ministry of Agriculture.
Taiwan	1,165	-89	-14.7	↓	↓	Production estimate was lowered due to water shortages that lowered harvested area and reduced the yield. At 250,000 hectares, harvested area is 20,000 hectares below the previous forecast and 8 percent below a year earlier and one of the lowest since 1900. The revised average yield of 6.66 tons per acre is fractionally above the previous forecast but more than 7 percent below a year earlier.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, Supply and Distribution Database.

Burma's 2021 Rice Export Forecast lowered 0.3 Million Tons, Thailand's Raised 0.1 Million Tons

Global rice trade in calendar year 2021 is projected at 46.0 million tons (milled basis), down almost 0.2 million tons from the previous forecast but 2 percent larger than a year earlier. This month, export forecasts were lowered for Burma, Ecuador, the United States, and Uruguay, with Burma's export forecast lowered 0.3 million tons to 2.1 million tons. These downward export revisions were partly offset by increases for Brazil, Peru, and Thailand, with Thailand's export forecast raised 0.1 million tons to 6.2 million tons.

On an annual basis, in 2021 India is expected to expand exports the most, increasing shipments 0.94 million tons to a record 15.5 million tons, a result of huge supplies and continued very competitive prices. Thailand is projected to increase exports almost 0.5 million tons. In addition, Australia, Cambodia, Pakistan, the United States, and Vietnam are projected to increase exports in 2021. In contrast, Argentina, Brazil, Burma, Paraguay, Taiwan, and Uruguay are expected to export less rice.

Import forecasts for 2021 were lowered 0.2 million tons this month for the Philippines and the United Arab Emirates and lowered 0.1 million tons for Colombia. Smaller import reductions were made for Peru, Senegal, and the United States. These downward revisions were partially offset by upward revisions for Indonesia and Oman. On a year-to-year basis, Bangladesh, Cote d'Ivoire, Ghana, Indonesia, Nigeria, North Korea, the United Arab Emirates, and Vietnam account for the bulk of the expected import growth, with Bangladesh's imports expected to increase nearly 1.3 million tons. Australia, China, Colombia, Malaysia, Mexico, the Philippines, Saudi Arabia, Singapore, Turkey, the United States, and Venezuela are expected to import less rice in 2021.

Table B - Selected rice importers at a glance (1,000 metric tons), April 2021.						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation of year-to-year change in forecast or month-to-month change in forecast
Rice importers, 2021						
Colombia	100	-100	-57.8	↓	↓	Import forecast lowered based on a larger crop. These are lowest calendar imports since 2010.
Indonesia	700	200	27.3	↑	↑	Import forecast was raised primarily based on a smaller crop. While the Government of Indonesia recently announced it planned to import 1 million tons of rice in 2021, the President has since banned imports until after the March-May harvest of the main season crop.
Oman	250	30	0.0	↑	→	Raised imports to be in line with finalized 2020 imports.
Peru	300	-30	-3.2	↓	↓	Import forecast reduced based on a slower-than-expected pace to-date and recommendations from the U.S. Agricultural Office in Lima.
Philippines	2,000	-200	-18.4	↓	↓	Import forecast lowered based on a record crop and a slower-than-expected pace of imports through the first quarter of 2021.
Senegal	1,125	-50	-2.2	↓	↓	Lowered import forecast based on a larger crop.
United Arab Emirates	1,000	-200	17.6	↓	↑	Lowered the 2021 import forecast based on a reduced domestic consumption forecast.
United States	1,175	-25	-2.9	↓	↓	Import forecast lowered based on a slower-than-expected pace of long-grain imports. Basmati rice imports from South Asia account for much of the recent slower pace of U.S. long-grain imports.

Table B - Selected rice importers at a glance (1,000 metric tons), April 2021--*Continued*.						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation of year-to-year change in forecast or month-to-month change in forecast
Rice importers, 2020						
Brazil	853	-23	23.4	↓	↑	Import reduction based on 2020 yearend trade data.
Ecuador	70	-10	-12.5	↓	↓	Import estimate reduced based on information from the U.S. Agricultural Office in Quito.
Nigeria	1,800	200	0.0	↑	→	Raised import estimate based on yearend trade data, including informal border trade.
Oman	250	30	8.7	↑	↑	Import estimate raised based on yearend trade data.
Saudi Arabia	1,613	-17	13.2	↓	↑	Lowered import estimate based on yearend trade data.
Sri Lanka	16	-4	-33.3	↓	↓	Import estimate lowered based on bumper rice crops and efforts by the Government of Sri Lanka to reduce imports.
Turkey	530	30	8.4	↑	↑	Import estimate raised based on yearend trade data. China remains the number one supplier of rice to Turkey.
United Arab Emirates	850	-150	0.0	↓	→	Reduced import estimate based on derived trade data and on 2020 estimates developed by the U.S. Agricultural Office in Dubai. Rice consumption declined in 2020 due to impacts from COVID-19.
Uzbekistan	20	3	-28.6	↑	↓	Raised import estimate based on yearend trade data.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, Supply and Distribution Database.

Table C - Selected rice exporters at a glance (1,000 metric tons), April 2021.						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation of year-to-year change in forecast or month-to-month change in forecast
Rice exporters, 2021						
Brazil	900	100	-27.4	↑	↓	Raised calendar year 2021 exports based on higher demand from non-traditional buyers such as Guatemala, Honduras, Turkey, and Nicaragua.
Burma	2,100	-300	8.7	↓	↑	Lowered exports based on a smaller crop and expectations that major trade and logistical disruptions stemming from the February 1 military coup will continue for several months.
Ecuador	20	-4	-54.5	↓	↓	Expect weaker purchases from Colombia in 2021.
Peru	80	30	6.7	↑	↑	Import forecast raised based on expectations regarding informal trade.
Thailand	6,200	100	8.7	↑	↑	Raised 2021 export forecast based on a larger crop, larger expected purchases from Indonesia, and weaker expected exports from Burma.
United States	3,000	-50	4.7	↓	↑	Lowered export forecast based on a slower-than-expected pace of shipments through March. U.S. shipments were substantially below a year earlier to Colombia, Haiti, and Mexico, all typically top buyers of U.S. rice.
Uruguay	780	-40	-19.3	↓	↓	Export forecast reduced based on tight supplies and a smaller crop.
Table C - Selected rice exporters at a glance (1,000 metric tons), April 2021--*Continued*.						
Country or region	Current forecast	Change from last month's forecast	Percent change from a year earlier	Month-to-month direction	Year-to-year direction	Explanation of year-to-year change in forecast or month-to-month change in forecast
Rice exports, 2020						
Pakistan	3,934	34	-13.5	↑	↓	Export estimate raised based on yearend trade data.
Peru	75	-25	-28.6	↓	↓	Reduction based on yearend estimates of informal trade.
Turkey	234	9	15.8	↑	↑	Increased export estimate based on yearend trade data.
Uruguay	967	7	19.5	↑	↑	Increased export estimate based on yearend trade data.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, Supply and Distribution Database.

Trading prices for most grades of Thailand's regularly milled white rice (non-aromatic or other specialty rice) declined 5-6 percent over the past month, mostly due to continued weakening of its currency and the recent entry of some second-season crop harvest into the market. Thailand's 100-percent Grade B long-grain milled rice for export was quoted at $490 per ton for the week ending April 5, down $31 from the week ending March 8. Prices for Thailand's 5-percent brokens parboiled rice—a specialty rice—were quoted at $473 per ton for the week ending April 5, down $34 from the week ending March 8. Prices for Thailand's jasmine rice—a premium aromatic—were quoted at $774 per ton for the week ending April 5, down $46 from the week ending March 8.

Price quotes for Vietnam's rice decreased over the past month as well, mostly due to continued entry of the spring crop harvest into the market. The spring crop is the largest of Vietnam's three annual rice crops, with much of it exported. For the week ending April 6, prices for Vietnam's 5-percent broken-kernel long-grain milled rice were quoted at $495 per ton, down $20 from the week ending March 9. Vietnam's rice now sells at round a $14 premium to comparable grades of Thailand's rice. India's prices remain the most competitive among Asian sellers, with India's 5-percent broken non-parboiled white rice quoted at $410 per ton (bulk) for the week ending April 6, up $10 from the week ending March 9.

Prices quotes from Uruguay, Argentina, and Paraguay for their 5-percent broken kernel long-grain milled rice were unchanged from a month earlier, with U.S. prices currently quoted about the same as quotes for similar quality shipments from Uruguay—quoted at $620 per ton—and Argentina—quoted at $600 per ton. The major South American exporters—located in the southern half of the continent—begin their harvests between late February and early April, depending on their distance from the equator. Production is projected to be smaller than a year earlier for Argentina, Brazil, and Paraguay.

U.S. trading prices for long-grain milled rice were unchanged over the past month, despite a bumper 2020/21 crop. Prices for U.S. long-grain milled rice, Number 2 Grade, 4-percent broken kernels (free on board a vessel at a Gulf port, Iraq specifications) remain quoted at $625 per ton for the week ending April 6, unchanged since early August. U.S prices for Latin American milled-rice markets—Haiti, Colombia, and Mexico—remain quoted at $550 per ton for the week ending April 6, also unchanged since early August.

In contrast, milled rice prices in California increased over the past month. Quotes for California Number 1 Grade, 4-percent broken kernels for the week ending April 6 were quoted at $945 per ton (free on board at a domestic mill, Mediterranean specifications), up $45 from the week ending March 9. For delivery to the Port of Oakland, California, medium-grain milled rice (Korean specifications) prices were quoted at $1,000 per ton for the week ending April 6, also up $40 from the week ending March 9. The recent California price increase is likely a response to expectations of water restrictions and reduced acreage due to the lack of normal rainfall and snowfall over the past winter. For listings of trading prices by exporter and grade of rice, see Table 9 in the Excel file.

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