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Rice Outlook: November 2021

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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 Crop Forecast Raised to 193.8 Million Cwt

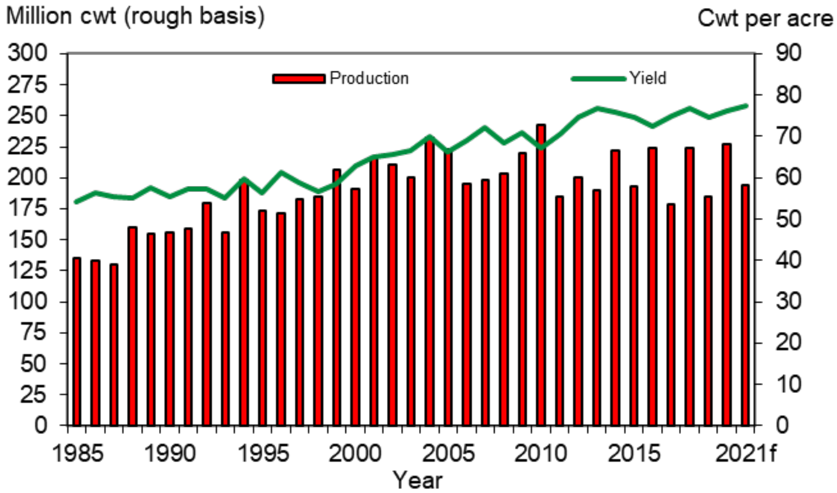
There were several revisions this month on both the supply and use side of the 2021/22 U.S. rice balance sheet. On the supply side, the production forecast was raised almost 2 percent to 193.8 million cwt, still down 15 percent from a year earlier. The upward revision was based on a record yield of 7,756 pounds per acre reported by USDA's National Agricultural Statistics Service (NASS), up 131 pounds from the previous forecast. In contrast, the 2021/22 import forecast was lowered 1.0 million cwt to 35.0 million based on a slower-than-expected pace of shipments of long-grain rice from Asia through September. On the use side, the 2021/22 export forecast was lowered 1.0 million cwt to 90.0 million, while the domestic and residual use forecast was raised 1.5 million cwt to 147.5 million cwt. These supply and use revisions resulted in a 1.8-million cwt increase in the 2021/22 ending stocks forecast to 35.0 million cwt, still 20 percent less than a year earlier. There were no revisions to the 2021/22 season-average farm price (SAFP) forecasts this month. However, there were several revisions to the 2020/21 SAFP estimates based on revised monthly prices and marketings reported by NASS in late October.

In the global rice market, production in 2021/22 is forecast at a record 511.7 million tons (milled basis), up 1.0 million tons from the previous forecast and 4.4 million tons larger than a year earlier. Production forecasts were raised this month for Burkina Faso, Chad, Congo (Kinshasa), Ethiopia, Guinea, Tanzania, the United States, and Uruguay, but lowered for Ecuador, Niger, and Turkey. Global rice consumption and residual use is projected at a record 511.3 million tons, down 1.0 million tons from the previous forecast but 9.7 million tons larger than a year earlier. India accounts for the bulk of this month's decrease in the global consumption and residual use forecast. Global ending stocks are forecast at a record 187.9 million tons, up 4.3 million from the previous forecast and 0.5 million tons above a year earlier. India accounts for the bulk of the upward revision in global ending stocks.

Global rice trade in calendar year 2022 is projected at 48.7 million tons (milled basis), down fractionally from the previous forecast and more than 0.6 million below the year-earlier record. Export forecasts were raised this month for India but lowered for Burma and China. China's 2022 import forecast was raised 0.5 million tons, while import forecasts for Colombia and Iran were lowered. Over the past month, quotes for Thailand's trading prices for most grades of regularly milled white rice (excluding aromatic rice and brokens) decreased 1.0-1.5 percent from a month earlier, while Vietnam's price quotes were unchanged. U.S. trading prices for long-grain milled rice were unchanged over the past month.

Figure 1

U.S. rice production in 2021 is projected to decrease almost 15 percent



Cwt = Hundredweight. 2021f = forecasts.
Sources: USDA, Economic Research Service, *Rice Yearbook* dataset; 1985/86-2018/19; USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates,* 2019/20-2021/22.

Domestic Outlook

U.S. 2021/22 Rice Crop Projection Raised 3.3 Million Cwt

The 2021/22 U.S. rice production forecast was raised almost 2 percent to 193.8 million, still almost 15 percent smaller than a year earlier. This month's production increase was due to an increase in the average yield. Harvested area remains estimated at 2.5 million acres, more than 16 percent below a year earlier. The long-grain production forecast was raised 2.5 cwt to 146.7 million, down 14 percent from a year earlier. The year-to-year decline is the result of a substantial area reduction. Almost all long-grain rice is grown in the South. The combined medium- and short-grain crop is forecast at 47.1 million cwt, up 0.8 cwt from the previous forecast but still 17 percent below a year earlier and the smallest since 2005/06. The year-to-year decline is largely due to severe drought in California, where most of the U.S. medium- and short-grain crop is grown. Arkansas and Louisiana account for most of the remaining U.S. medium- and short-grain production.

At 7,756 pounds per acre, the 2021/22 average all-rice yield is up 131 pounds from the previous forecast, 137 pounds above a year earlier and the highest on record. This month, the U.S. Department of Agriculture raised its yield forecasts for every reported State except Louisiana. where yields were unchanged from October. The revised yield forecasts are based on a survey of rice producers conducted from October 24 to November 4 that asked growers about their expected yields as of November 1. Revised yield estimates were reported for all-rice and by State. Survey-based yields by class for the United States and by State will be reported by NASS in the 2022 *Crop Production 2021 Summary* that will be released on January 12.

Harvested area is estimated below a year earlier in all reported States except Texas. In the Delta, harvested area in Arkansas remains reported at 1.20 million acres, 17 percent below a year earlier. Mississippi's 2021/22 rice harvested area remains reported at 101,000 acres, 39 percent below a year earlier and the smallest since 1973/74. In Missouri, 2021/22 harvested area remains reported at 194,000 acres, down 9 percent from a year earlier. On the Gulf Coast, Louisiana's harvested area remains reported at 413,000 acres, 13 percent below a year earlier. In Texas, 2021/22 harvested area remains reported at 188,000 acres, up 5 percent from a year earlier. In much of the South, persistent rainfall nearly all spring prevented and delayed plantings on substantial rice acreage. In March, growers in the South had already indicated they intended to plant less rice in 2021/22 than a year earlier due to higher expected returns for corn and soybeans. Finally, in California, 2021/22 rice harvested area remains reported at just 405,000 acres, 21 percent below a year earlier and the smallest since 1992/93. The sharp decline in California harvested area this year is the result of severe drought and abnormally low reservoir levels in northern California.

Yields are projected to be above a year earlier in all reported States except Texas, with record yields reported for all States except Louisiana and Texas. The Arkansas yield is forecast at a record 7,600 pounds per acre, up more than 1 percent from a year earlier. At 8,100 pounds per acre, Missouri's 2021/22 yield is up almost 12 percent from a year earlier and is the highest on record for the State. Mississippi's record yield of 7,500 pounds per acre is up 1 percent from a year earlier. Louisiana's yield of 6,900 pounds per acre is also up 1 percent from a year ago. Despite a severe drought and record-low reservoir levels, the California 2021/22 yield is forecast at a record 9,200 pounds per acre, up 5.5 percent from a year earlier. In contrast, the Texas 2021/22 average yield of 7,300 pounds per acre is down more than 10 percent from a year earlier.

Production is projected below a year earlier in all reported States except Missouri. The Arkansas 2021/22 rice crop is projected at 91.0 million cwt, down 16 percent from a year earlier, a result of smaller area. Mississippi's production is forecast at 7.58 million cwt, down 38 percent from a year earlier and the smallest since 1983/84, due entirely to reduced plantings. Missouri's rice crop is projected at 15.7 million cwt, up 1 percent from a year earlier as a record yield more than offset an area decline. Louisiana's production remains forecast at 28.5 million cwt, 12 percent below a year earlier, a result of smaller plantings. Texas rice production is now projected at 13.7 million cwt, a decline of 6 percent from 2020/21, a result of a weaker yield; planted area actually expanded this year in Texas. Finally, California's production is forecast at 37.3 million cwt, almost 17 percent below a year earlier, a result of a sharp drop in area caused by the severe drought in the State. This is the smallest California rice crop since 1999/2000, although the 2017/18 California crop was only fractionally larger than this year's crop.

Harvest is virtually complete in all producing regions except for the harvest of the ratoon crop—or partial second crop—in Louisiana and Texas. For the week ending October 24, USDA's National Agricultural Statistics Service reported 97 percent of the California 2021/22 rice crop was harvested, 3 percentage points ahead of a year earlier and well ahead of the State's 5-year average of 88 percent. This year's record harvest pace in California was mostly due to the substantial area decline, which facilitated a faster-than-normal harvest pace. In the Delta, the harvest pace was behind normal throughout the season due to excessive rainfall all spring and into the summer that delayed planting and hindered field operations.

U.S. 2021/22 Long-Grain Import Forecast Lowered Again

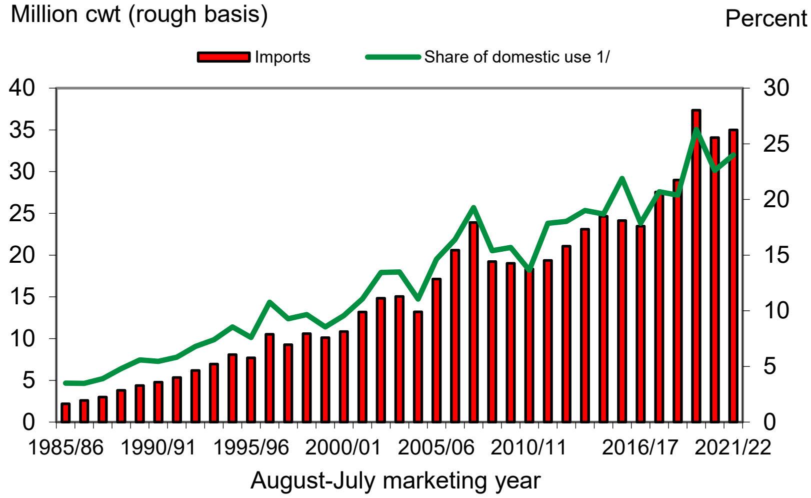
Total U.S. rice supplies in 2021/22 are projected at 272.5 million cwt, up 2.3 million cwt from the previous forecast but 6 percent below a year earlier. This month's upward revision in total supplies is the result of a larger crop forecast more than offsetting a reduced import forecast. The year-to-year decline is the result of a much smaller crop more than offsetting a big boost in carryin and slightly higher imports. At 203.5 million cwt, U.S. 2021/22 long-grain supplies are 1.5 million cwt larger than the previous forecast but more than 5 percent smaller than a year earlier. Combined medium- and short-grain supplies are projected at 66.5 million cwt, up 0.8 cwt from the previous forecast, more than 8 percent below a year earlier and the smallest since 2008/09. In 2008/09, U.S. medium- and short-grain farm prices were record-high.

U.S. 2021/22 all-rice imports are forecast at 35.0 million cwt, down 1.0 million from the previous forecast but still almost 3 percent larger than a year earlier. U.S. long-grain imports are forecast at 27.0 million cwt, down 1.0 million from the previous forecast and down 1 percent from a year earlier. This month's downward revision in long-grain imports was based on a recent slowdown in monthly deliveries. Since April, monthly U.S. imports of long-grain rice have been smaller than a year earlier. The reduced import pace is likely the result of continued container shortages and extremely high ocean freight costs.

From August to September, the United States imported 113,971 tons (product-weight) of long-grain rice, down 28 percent from a year earlier. In September, the United States imported 61,812 tons of long-grain rice, up 18.5 percent from August but 17 percent below a year earlier. Thailand remains the largest supplier of long-grain rice to the United States, exporting 42,941 tons in September, up 46 percent from August and 12.5 percent larger than a year earlier. U.S. imports of Thailand's long-grain rice peaked in the spring of 2020 at more than 70,000 tons a month and then returned to a more normal level of monthly purchases of 40,000-50,000 tons that summer. U.S. imports from Thailand dropped sharply in June and remained low through August. Almost all U.S. long-grain imports of Thai rice are jasmine rice, a premium aromatic.

Figure 2

U.S. rice imports in 2021/22 projected second-highest on record



Cwt = Hundredweight. 2021/22f = forecasts. 1/ Does not include seed use.
Sources: USDA, Economic Research Service, *Rice Yearbook* dataset 1985/86-2018/19; USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates,* 2019/20-2021/22.

India is typically the second-largest supplier of long-grain rice to the United States, shipping 11,444 tons in September, down 18 percent from August and 47.5 percent below a year earlier. Basmati, also a premium aromatic, accounts for nearly all U.S. long-grain rice imports from India. Pakistan was the third-largest long-grain supplier in September, shipping 1,442 tons, 44 percent below August and 40 percent less than a year earlier, with basmati accounting for most of these shipments. Imports from Brazil, mostly brokens, were just 1,876 tons through September, 88 percent below a year earlier.

Medium- and short-grain imports remain projected at a record 8.0 million cwt in 2021/22, 19 percent larger than a year earlier. Puerto Rico is expected to again import at least three shipments of 21,000 tons of medium- and short-grain rice, with a fourth shipment possible, depending on the timing of the first three shipments and Puerto Rico's need for imported rice. In September, Puerto Rico received its first 21,000-ton shipment in 2021/22. China has supplied all but one of these shipments since May 2018, when Puerto Rico shifted from buying mostly U.S. rice due to much lower prices for rice from China. However, in May 2021, India supplied a 21,000-ton shipment to Puerto Rico. China, India, and Thailand are the top suppliers of medium and short-grain rice to the United States, including the Puerto Rican market. Together, these three Asian suppliers account for 90 percent or more of U.S. medium- and short-grain imports. Italy, Japan, Spain, and Argentina supply most of the remaining U.S. medium- and short-grain imports, typically shipping small amounts each month.

Through September, the United States imported 40,462 tons of medium- and short-grain rice, up 39 percent from a year earlier. In September, the U.S. imported 29,376 tons of medium- and short-grain rice, up 165 percent from August and up 148 percent from a year earlier. China's shipment to Puerto Rico was responsible for most of the month-to-month and year-to-year increase in medium- and short-grain rice imports in September. Thailand supplied 5,061 tons of medium- and short-grain rice in September, down 17 percent from a month earlier but 45 percent larger than a year ago. Similar to long-grain rice, U.S. imports of Thailand's medium-and short-grain rice peaked April-August 2020. Most of this rice is specialty rice classified as medium- and short-grain. India supplied 1,779 tons of medium- and short-grain rice in September, 36 percent less than in August and 73 percent below a year earlier.

The 2021/22 U.S. all-rice carryin remains estimated at 43.7 million cwt, more than 52 percent above the year-earlier abnormally low level. The 2021/22 long-grain carryin remains estimated at 29.7 million cwt, 76 percent larger than in 2020/21. In contrast, the 2021/22 medium- and short-grain carryin remains estimated at 11.5 million cwt, 7 percent larger than a year earlier.

U.S. 2021/22 Export Forecast Lowered; Domestic and Residual Use Raised

Total use of all-rice in 2021/22 is projected at 237.5 million cwt, up 0.5 million cwt from the previous forecast—a result of a higher domestic and residual use forecast more than offsetting weaker exports—but still almost 4 percent smaller than a year earlier. Both exports and combined domestic and residual use are expected to be smaller than a year earlier in 2021/22. Long-grain total use remains projected at 179.0 million cwt, more than 3 percent smaller than a year earlier. Combined medium- and short-grain total use is forecast at 58.5 million cwt, up 0.5 million from the previous forecast but more than 4 percent below 2020/21.

Total domestic and residual use in 2021/22 is projected at 147.5 million cwt, up 1.5 million from the previous forecast but still almost 4 percent smaller than the year-earlier record. This month's upward revision was based on a larger crop projection. The year-to-year projected reduction is based on smaller U.S. supplies—primarily a much smaller crop, which implies smaller post-harvest losses in marketing and milling. Long-grain domestic and residual use is projected at 115.0 million cwt, up 1.0 million cwt from the previous forecast but more than 4 percent below the year-earlier record. Combined medium- and short-grain domestic and residual use is projected at 32.5 million cwt, up 0.5 million from the previous forecast and fractionally larger than a year earlier.

U.S. exports of all rice in 2021/22 are projected at 90.0 million cwt, down 1.0 million from the previous forecast and 4 percent below a year earlier. The year-to-year decline in U.S. exports is based on smaller U.S. supplies and less-competitive U.S. prices. From August through September, the U.S. Bureau of the Census reported 542,534 tons (product-weight) of rice exported, up almost 103 percent from the year-earlier's abnormally low level, which was a result of extremely tight ending supplies of long-grain rice in 2020/21. In September, the United States exported 191,712 tons of rice, down 45 percent from August but 39 percent larger than the year-earlier abnormally low shipments.

Long-grain exports in 2021/22 are projected at 64.0 million cwt, down 1.0 million cwt from the previous forecast and nearly 2 percent smaller than a year earlier. By spring 2022, the United States is expected to face stronger competition from South American suppliers in key Latin American markets, largely offsetting the impact of the large sales to Iraq in early August 2021. Most South American exporters are expected to harvest larger crops next spring compared with their 2020/21 crops, which in several countries were adversely impacted by drought.

From August to September, the U.S. Bureau of the Census reported 431,169 tons of long-grain rice exported, 207 percent above a year earlier. In September, the United States exported 146,854 tons of long-grain rice, down 48 percent from a month earlier but 53 percent larger than a year ago. Mexico was the largest export market for U.S. long-grain rice for August-September, with Central America—mostly Guatemala and Honduras—the second-largest market, followed by the Caribbean with Haiti the largest buyer in the region.

Combined medium- and short-grain exports in 2021/22 remain projected at 26.0 million cwt, down 10 percent from 2020/21. The year-to-year decline in exports is based on expectation of few sales outside the core U.S. markets in Northeast Asia where the bulk of U.S. medium- and short-grain exports are shipped: Japan, South Korea, and Taiwan. U.S. medium- and short-grain sales to the Middle East are expected to be lower than in 2020/21, with Jordan, Saudi Arabia, and Israel again the main buyers. The United States is not expected to sell any rice to North Africa. The tighter U.S. supplies of medium- and short-grain rice are expected to reduce exportable sales and boost U.S. trading prices. In addition, by late spring 2022, Australia is expected to be in position to increase its exports due to a strong area expansion in 2021/22, partly a response to higher expected global trading prices for medium-grain rice. Australia is expected to increase its market share in Northeast Asia and Oceania. China is expected to again have abundant supplies of extremely-low-priced Government-held stocks of medium- and short-grain rice available for export, with North Africa, the Middle East, and Oceania major markets for medium- and short-grain exports.

From August to September, the U.S. Bureau of the Census reported that 111,366 tons (product-weight) of medium- and short-grain rice were shipped, 13 percent below a year earlier. In September, the United States exported 44,858 tons of medium- and short-grain rice, 33 percent smaller than a month earlier but 6 percent above a year earlier. Japan, Jordan, and Taiwan accounted for the bulk of U.S. medium- and short-grain rice exports during the period.

By type, U.S. rough-rice exports in 2021/22 remain projected at 33.0 million cwt, down almost 5 percent from a year earlier. Mexico is expected to remain the largest buyer of U.S. rough-rice, taking almost all long-grain. Venezuela is again expected to be a major buyer of U.S. rough-rice exports, taking almost 300,000 tons in 2020/21, all long-grain. Almost all U.S. rough-rice exports are currently shipped to Latin America. The U.S. Bureau of the Census reported that more than 247,000 tons of rough-rice were exported August-September, virtually all long-grain, with Mexico the largest market, followed by Central America, with Guatemala and Honduras the largest buyers in the region. Venezuela ranked third.

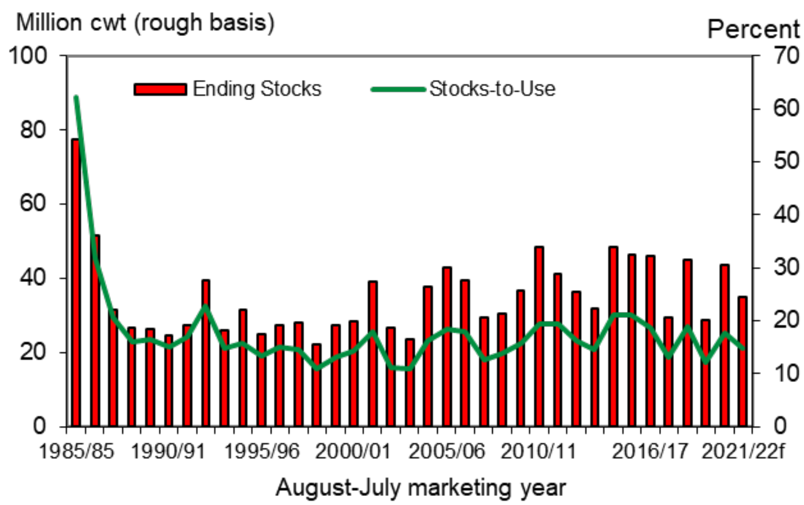
Milled-rice exports (milled-and brown-rice exports on a rough-rice basis) are projected at 57.0 million cwt, down 1.0 million from the previous forecast, 4 percent from a year earlier and the lowest since 1975/76. The United States is expected to make few sales of milled rice beyond Northeast Asia, Haiti, Canada, Iraq, Jordan, Saudi Arabia, and Israel. However, Mexico, although primarily a rough-rice market, regularly imports small quantities of U.S. milled rice. U.S. milled-rice exports are limited by cheaper rice from Asia, as well as by growing competition from several South American exporters. From August to September, the U.S. Bureau of the Census reported 295,133 tons of milled rice exported, with Japan, Iraq, Haiti, and Canada the largest markets.

U.S. Ending Stocks Projected Smaller in 2021/22; Season-Average Farm Prices Projected Higher

The above supply and use revisions result in a 2021/22 ending stocks forecast of 35.0 million cwt, up 1.8 million cwt from the previous forecast but 20 percent less than a year earlier. The all-rice stocks-to-use ratio is projected at 14.7 percent, down from 17.7 percent a year earlier. Long-grain ending stocks are projected at 24.5 million cwt, down 1.5 million from the previous forecast and 17 percent below a year earlier. The long-grain stocks-to-use ratio is projected at 13.7 percent, down from 16.0 percent a year earlier. Combined medium- and short-grain ending stocks are projected at 8.0 million cwt, up 0.3 million cwt from the previous forecast but almost 30 percent smaller than a year earlier. The 2021/22 medium- and short-grain stocks-to-use ratio is projected at 13.7 percent, down from 18.7 percent a year earlier.

Figure 3

U.S. rice ending stocks projected to decrease 20 percent in 2021/22



Cwt = Hundredweight. 2021/22f = forecasts.
Sources: USDA, Economic Research Service, *Rice Yearbook* dataset 1985/86-2018/19; USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates,* 2019/20-2021/22.

There were no revisions this month to the 2021/22 season-average farm price (SAFP) forecasts. The 2021/22 long-grain SAFP remains forecast at $13.00 per cwt, up 40 cents from a year earlier. The California medium- and short-grain 2021/22 SAFP remains forecast at $23.00, up $2.10 from revised 2020/21 estimate and the highest since the 2008/09 record of $27.40 per cwt. The southern medium- and short-grain SAFP remains forecast at $14.00 per cwt, up $0.90 from the 2020/21 revised estimate and the highest since 2014/15. With a substantial decrease in the California crop in 2021/22 due to the acreage decline, some users of medium- and short-grain rice are expected to switch from California rice to southern medium- and short-grain rice. The U.S. 2021/22 medium- and short-grain SAFP remains forecast at $20.10 per cwt, $1.30 higher than the year-earlier revised estimate. The 2021/22 U.S. all-rice SAFP remains forecast at $14.80 per cwt, up $0.80 from the year-earlier revised U.S. SAFP.

Last month, USDA's National Agricultural and Statistics Service made revisions to the 2020/21 U.S. monthly cash prices and marketings. These monthly revisions resulted in revisions for 2020/21 SAFP estimates except for long-grain, which remains forecast at $12.60 per cwt. The 2020/21 California medium- and short-grain SAFP was raised $1.20 to $20.90 per cwt. The southern medium- and short-grain SAFP was raised 10 cents to $13.10 per cwt. These two regional revisions resulted in a $1.10 increase in the U.S. medium- and short-grain SAFP to $20.90 per cwt. The U.S. all-rice SAFP was raised 30 cents to $14.00 per cwt.

International Outlook

Production Forecasts for 2021/22 Raised for Congo (Kinshasa) and Guinea, but Lowered for Ecuador and Turkey

Global rice production in 2021/22 is forecast at a record 511.7 million tons (milled basis), up 1.0 million tons from the previous forecast and 4.4 million tons larger than a year earlier. Production forecasts for 2021/22 were raised this month for Burkina Faso, Chad, Congo (Kinshasa), Ethiopia, Guinea, Tanzania, the United States, and Uruguay, but lowered for Ecuador, Niger, and Turkey. Congo (Kinshasa) and Guinea accounted for the bulk of this month's upward revision in global rice production.

On an annual basis, Australia, Bangladesh, Cambodia, China, Cote d'Ivoire, Ghana, Guinea, India, Laos, Mali, Mexico, Nigeria, Paraguay, Peru, Senegal, Sri Lanka, South Korea, Tanzania, Thailand, and Uganda account for the bulk of the projected global production increase in 2021/22, with Bangladesh, China, India, and Thailand showing the largest year-to-year production increases. In contrast, crops are projected to be smaller than a year earlier in Colombia, Egypt, EU, Guyana, Iran, Iraq, Kazakhstan, Madagascar, North Korea, the Philippines, Russia, Turkey, the United States, Uruguay, and Vietnam. The United States and Egypt are projected to show the largest production declines in 2021/22.

Global rice consumption and residual use in 2021/22 is projected to be a record 511.3 million tons, down 1.0 million tons from the previous forecast but 9.7 million tons larger than a year earlier. India accounts for the bulk of this month's decrease in the global consumption and residual use forecast. India's 2021/22 domestic and residual use forecast was lowered 1.5 million tons to 103.5 million, still the highest on record and up more than 3 percent from a year earlier. The downward revision was based on an upward revision in India's 2021/22 ending stocks forecast—largely based on a higher 2020/21 ending stocks estimate and stronger exports in 2021/22. China's 2021/22 consumption and residual use forecast was lowered 0.2 million cwt to 154.9 million tons, still a record and up 3 percent from a year earlier. The downward revision was based on higher 2021/22 ending stocks forecast for China.

On a year-to-year basis, Bangladesh, Burma, Cambodia, China, India, Nepal, the Philippines, and Thailand account for the bulk of the expected increase in global consumption and residual use in 2021/22. In contrast, consumption and residual use is projected to decline in 2021/22 in Egypt, Japan, South Korea, and the United States. The decline in the two East Asian countries is due to long-term shifts in diet away from rice to a more a Western Diet and to a declining population in Japan and only negligible population growth in South Korea. Egypt's decline is based a much smaller crop and resulting tighter supplies, despite record imports. The projected decline in the United States is based on a much smaller crop, which indicates fewer residual use which includes post-harvest losses.

Table A - Global rice production, selected monthly revisions and year-to-year changes, November 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 2021/22						
Burkina-Faso	305	58	5.2	↑	↑	Raised the production forecast to a record-high based on a 40,000-hectare increase in harvested area to a record 210,000 hectares.
Chad	189	33	0.0	↑	→	Increased the production forecast to a record-high based on a slightly larger harvested area estimate and a stronger yield. The average yield forecast was increased 18 percent to 1.62 tons per hectare, unchanged from the year earlier revised estimate. Harvested area was raised 5,000 hectares to 195,000 hectares, unchanged from the year earlier revised estimate.
Congo (Kinshasa)	882	630	1.5	↑	↑	Production forecast was raised to a record-high primarily based on a 235-percent increase in the harvested area estimate to a record 1.3 million hectares, up 1 percent from the year earlier revised estimate. The substantial upward revisions in harvested area and production were based on revised United Nations Food and Agriculture Organization data for 2011/12-2019/20. The 2021/22 average yield was raised almost 5 percent to 0.76 tons per hectare, nearly unchanged from a year earlier.
Ecuador	863	-66	2.5	↓	↑	Reduced the production forecast based on both a smaller harvested area and lower yield. Harvested area was lowered 10,000 hectares to 300,000 hectares, 4 percent below a year earlier. The average yield was lowered 4 percent to 4.57 tons per hectare, 7 percent above a year earlier. The year-to-year harvested area decline was mostly due to low price expectations.
Ethiopia	130	19	4.8	↑	↑	Raised the production forecast based on a 17-percent increase in the yield forecast to 3.33 tons per hectare, 1 percent above a year earlier. Harvested area remains estimated at 60,000 hectares, up 2,000 hectares from 2020/21.
Guinea	1,820	170	2.1	↑	↑	Raised the production forecast to a record-high based on a 10-percent increase in the yield to 1.45 tons per hectare, up 2 percent from a year earlier. Harvested area remains estimated at a near-record 1.9 million hectares, unchanged from the year earlier revised estimate.
Niger	69	-12	16.9	↓	↑	Decreased the production forecast based on data from the United Nation's Food and Agriculture Organization indicating a smaller crop. The yield forecast was lowered 15 percent to 3.53 tons per hectare, 3 percent below a year earlier. Harvested area remains estimated at 30,000 hectares, up 20 percent from a year earlier.
Tanzania	2,400	90	3.9	↑	↑	Production forecast was raised to a record-high due to a 4-percent increase in the yield to a record 3.31 tons per hectare, up 4 percent from the year earlier revised estimate. Harvested area remains estimated at a near-record 1.1 million hectares, unchanged from a year earlier.
Turkey	541	-50	-8.5	↓	↓	Reduced the production forecast based on a lower yield. At 8.32 tons per hectare, the average yield is 8.5 percent below both the previous forecast and a year earlier. Harvested area remains estimated at 97,000 hectares, unchanged from a year earlier. The reduced yield is largely the result of rice blast in fields in Marmara and Thrace. These revisions were based on information and data provided by the U.S. Agriculture Office in Ankara.
United States	6,154	104	-14.8	↑	↓	Raised the production forecast based on a higher yield reported by USDA's National Agricultural Statistics Service. The projected yield of 8.70 tons per hectare is up almost 2 percent from both the previous forecast and a year earlier and is the highest on record. Yield forecasts were raised this month for Arkansas, California, Mississippi, and Missouri.
Uruguay	882	49	-3.7	↑	↓	The production forecast was raised based on a larger harvested area and a higher yield. At 140,000 hectares, harvested area is up 5,000 hectares from the previous forecast and almost 1 percent larger than a year earlier. The average yield is forecast at 9.00 tons per hectare, 2 percent above the previous forecast but more than 4 percent below the earlier revised record-high.

Continued--

Table A - Global rice production, selected monthly revisions and year-to-year changes, November 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
1,000 metric tons (milled basis)						
Rice production in 2020/21						
Burkina-Faso	290	43	18.4	↑	↑	The production estimate was raised based on a 30,000-hectare increase in harvested area to 200,000 hectares, 13 percent higher than a year earlier and the second highest on record.
Chad	189	33	8.0	↑	↑	Raised the production estimate based on a higher yield and slightly larger harvested area. The average yield was raised 18 percent to 1.62 tons per hectare, 6 percent above a year earlier. The harvested area estimate was raised 5,000 hectares to 195,000, up 3,000 hectares from a year earlier.
Colombia	2,000	-10	14.3	↓	↑	Lowered the production estimate slightly based on a 5,000-hectare reduction in the harvested area estimate to 590,000 hectares. The average yield was raised fractionally to 4.98 tons per hectare, up almost 1 percent from a year earlier.
Congo (Kinshasa)	869	617	0.0	↑	→	Raised the production estimate based on a 231-percent increase in the harvested area estimate to 1.82 million hectares, the second highest on record. The substantial upward revisions in harvested area and production were based on revised United Nations Food and Agriculture Organization data for 2011/12-2019/20. The average yield was raised almost 5 percent to 0.76 tons per hectare, nearly unchanged from the year-earlier revised estimate.
Ecuador	842	-181	-9.5	↓	↓	Lowered the production estimate based on both smaller harvested area and a weaker yield. The harvested area estimate was lowered 17,000 hectares to 313,000, up 4 percent from a year earlier. The average yield was reduced 13 percent to 4.27 tons per hectare, 13 percent below a year earlier.
Ethiopia	124	13	11.7	↑	↑	Raised the production forecast based on an 12-percent increase in the yield forecast to 3.29 tons per hectare. Harvested area remains estimated at 58,000 hectares.
Guinea	1,782	264	3.9	↑	↑	Raised the production estimate based on a 228,000-hectare increase in the harvested area estimate to a near-record 1.9 million hectares and a 3-percent increase in the yield to 1.42 tons per hectare, up 5 percent from a year earlier.
Japan	7,573	6	0.5	↑	↑	Raised the production estimate based on a slightly higher yield reported by the Government of Japan.
Mauritania	219	-6	-4.8	↓	↓	Lowered the production estimate based on a slightly weaker yield. At 5.21 tons per hectare, the average yield is down 3 percent from the previous forecast and almost 1 percent below a year earlier.
Mexico	199	-11	13.7	↓	↑	Reduced the production estimate based on a weaker yield reported by the Government of Mexico. At 6.17 tons per hectare, the average yield is 5 percent below the previous forecast and almost 6 percent smaller than a year earlier. Yields in 2020/21 were adversely impacted by heavy hurricane-related wind and rain during the harvest period. Information and data for these revisions were provided by the U.S. Agriculture Office in Mexico City.
Sri Lanka	3,390	-60	5.7	↓	↑	Production estimate was reduced based on yearend area, yield, and production data for both the yala and maha crop reported by the Government of Sri Lanka. The all-rice average yield was lowered almost 2 percent to 4.57 tons per hectare, almost 6 percent below a year earlier. Harvested area remains estimated at 1.1 million hectares, up 12 percent from a year earlier.
Tanzania	2,310	66	0.7	↑	↑	Raised the production estimate based on a higher yield. At 3.18 tons per hectare, the average yield is up 3 percent from the previous estimate but nearly 4 percent below a year earlier. Harvested area remains estimated at a near-record 1.1 million hectares, up 4.5 percent from a year earlier.
Uganda	130	6	-9.1	↑	↓	Raised the production estimate based on a higher yield. At 2.22 tons per hectare, the average yield is up 5 percent from the previous estimate but 22 percent below a year earlier. Harvested are remains estimated at 90,000 hectares, unchanged from a year earlier.
Uruguay	916	76	8.3	↑	↑	Production forecast was raised based on a 9-percent increase in the yield to a record 9.42 tons per hectare, 9 percent above a year earlier. Harvested area remains forecast at 139,000 hectares, just 1,000 hectares below a year earlier. The record yield was largely due to excellent weather, including timely rainfall.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, supply and distribution database.

Table B - Selected rice importers at a glance (1,000 metric tons), November 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, 2022						
China	4,500	500	0.0	↑	→	Import forecast was raised based on expectations that the recent surge in the pace of shipments will continue next year. India and Vietnam have been the largest suppliers.
Colombia	50	-70	66.7	↓	↑	Lowered the import forecast based on a large carryin and low domestic prices that are largely due to a record 2020/21 rice crop, weak recovery in demand, high international rice prices and freight costs, and a strong dollar compared with the Colombian peso. Imports through October 2021 were substantially below a year earlier.
Cote d'Ivoire	1,300	50	4.0	↑	↑	Raised the import forecast based on large purchases from India and Vietnam in recent months.
EU	1,925	-75	6.9	↓	↑	Import forecast was lowered based on a recent slowdown in purchases, reduced expectations regarding Burma's exports in 2022, and adequate supplies in the EU going into the 2021/22 market year.
Guinea	750	25	0.0	↑	→	Raised the import forecast based on expectations that the recent stronger pace of purchases will continue in 2022. India is the largest supplier of rice to Guinea.
Guinea-Bissau	150	-10	25.0	↓	↑	Lowered the import forecast based on expectations that the slower-than-expected pace of purchases from Pakistan in 2021 will continue.
Iran	1,250	-50	31.6	↓	↑	Lowered the import forecast based on expectations that the recent slower-than-expected pace of purchase will continue in 2021.
Kazakhstan	100	10	-23.1	↑	↓	Import forecast was raised based on a stronger-than-expected pace of purchases in recent months, especially from Pakistan, Kazakhstan's top rice supplier.
Niger	400	10	0.0	↑	→	Raised the import forecast slightly to match the 2021 record imports.
Turkey	470	20	9.3	↑	↑	Import forecast was raised based on a smaller crop forecast for 2021/22.
United States	1,150	-25	2.2	↓	↑	Import forecast was reduced based on expectations that the recent slowdown in purchases will continue into 2022. A global shortage of containers and extremely high frieght costs are the main factors behind the recent slowdown in U.S. rice imports.

Continued--

Table B - Selected rice importers at a glance (1,000 metric tons), November 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, 2021						
Bangladesh	2,500	100	12,400.0	↑	↑	Import forecast was raised to a near-record high based on a stronger-than-expected pace of shipments through September. India supplies most of Bangladesh's rice imports. Bangladesh's 2020/21 rice production was adversely affected by severe flooding all summer and into October.
Brunei	20	-20	-9.1	↓	↓	Reduced the import forecast based on a slow pace of purchase early in the year.
Cambodia	25	5	150.0	↑	↑	Import forecast lowered based on the purchase-pace through September.
China	4,500	500	40.6	↑	↑	Raised the import forecast based on a very strong pace of shipments through September, with purchases reaching almost 3.6 million tons. India and Vietnam were the largest suppliers, each shipping more than 0.8 million tons. Pakistan, Burma, Thailand, and Cambodia have supplied most of the remaining rice imports. China is currently the largest rice importer in the world.
Cote d'Ivoire	1,250	50	13.6	↑	↑	Import forecast was raised based on larger-than-expected purchases from Vietnam and India in recent month's. Vietnam and India are the largest suppliers of rice to Coted d'Ivoire.
Guinea	750	25	11.9	↑	↑	Raised the import forecast based on a stronger-than-expected pace of purchases to date.
Guinea-Bissau	120	-30	-20.0	↓	↓	Lowered the import forecast based on a slower-than-expected pace of purchases from Pakistan.
Iran	950	100	-15.6	↑	↓	Reduced the import forecast based on a slower-than-expected pace of purchases through August, primarily from India, Iran's number one supplier.
Kazakhstan	130	40	49.4	↑	↑	Import forecast was raised based on stronger-than-expected purchases from top-supplier Pakistan.
Kenya	590	40	-1.7	↑	↓	Import forecast raised based on stronger-than-expected purchases from India, Pakistan, and Tanzania.
Liberia	350	-30	-6.7	↓	↓	Reduced the import forecast based on sporadic buying from India and no purchases to date from China.
Mexico	750	-50	-11.0	↓	↓	Reduced the import forecast based on a slower-than-expected shipment pace through September.
Oman	200	-50	-20.0	↓	↓	Import forecast was lowered based on a slower-than-expected shipment pace, especially from Pakistan.
Sierra Leone	420	20	-4.5	↑	↓	Increased the import forecast based on larger-than-expected purchases from China.
Singapore	370	10	-6.3	↑	↓	Raised import forecast slightly based on a steady pace of purchases from India, with India, Vietnam, and Thailand the largest suppliers of rice to Singapore.
Turkey	430	-20	-18.9	↓	↓	Lowered the import forecast based on a slower-than-expected pace of purchases to date, especially from China.
United Arab Emirates	750	-100	-11.8	↓	↓	Reduced the import forecast based on weaker demand for rice, likely due to decreased tourism and fewer guest workers.
Vietnam	1,650	400	312.5	↑	↑	Import forecast was raised to a record-high based on stronger-than-expected purchases from Cambodia. These purchases are primarily unmilled rice that is milled in Vietnam.

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), November 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, 2022						
Burma	1,800	-200	9.1	↓	↑	Lowered the export forecast based on the expectation that the recent slowdown in shipments will continue into 2022. The slower export pace has primarily been due to the continued border closure with China and lower demand from Africa and the EU.
China	2,100	-300	-8.7	↓	↓	Lowered the export forecast based on the expectation that China will carry more ending stocks in 2021/22..
EU	475	-75	5.6	↓	↑	Reduced the export forecast based on expectations that the recent slowdown in shipment pace will continue in 2022.
Kazakhstan	90	10	-10.0	↑	↓	Export forecast was raised based on expectations that the recent faster-than-expected pace of shipments will continue in 2022.
Turkey	220	-10	2.3	↓	↑	Lowered the export forecast based on a smaller crop in 2021/22.
United States	2,850	-25	-3.4	↓	↓	Export forecast was lowered based on a slower-than-expected pace of sales in recent months and stronger price competition from South American exporters.
Uruguay	850	50	11.8	↑	↑	Raised the export forecast based on an upward revision in the 2021/22 crop forecast.
Rice exporters, 2021						
Burma	1,650	-50	-28.3	↓	↓	Export forecast was reduced based on a recent slowdown in the shipment pace due to the continued border closure with China and lower-than-expected demand from African buyers and the EU.
Cambodia	1,700	400	25.9	↑	↑	Raised exports to a record high based primarily on stronger than expected shipments to Vietnam through August.
EU	450	-50	-11.1	↓	↓	Lowered the export forecast based on a slower-than-expected pace of shipments to date, mostly due to sluggish demand from countries in the Middle East.
Kazakhstan	100	10	1.0	↑	↑	Export forecast was raised slightly based on a stronger-than-expected pace of shipments to date.
Turkey	215	15	-8.1	↑	↓	Raised the export forecast based on a stronger-than-expected pace of shipments through August.
Uruguay	760	10	-21.4	↑	↓	Export forecast raised slightly based a larger crop forecast and a stronger-than-expected shipment pace through September.

Source: Created by USDA, Economic Research Service with data from USDA, Foreign Agricultural Service, Production, supply and distribution database.

In 2021/22, global ending stocks are forecast at a record 187.9 million tons, up 4.3 million from the previous forecast and 0.5 million tons above a year earlier. India's ending stocks were raised 3.5 million tons to a record 38.5 million based on a higher ending stocks estimate for 2020/21. India's 2020/21 ending stocks estimate was raised 2.5 million tons to 36.0 million based on the latest information on the level of Government-held rice stocks on October 1. India's 2021/22 ending rice stocks are forecast to be up 2.5 million tons from a year earlier. China's ending stocks were raised 1.0 million tons to 113.0 million, 3.5 million tons below the year-earlier record. In 2021/22, China is projected to account for 60 percent and India for 20 percent of global ending rice stocks. The U.S. 2021/22 ending stocks forecast was raised

56,000 tons to 1.11 million, down almost 0.3 million tons from a year earlier. The 2021/22 global stocks-to-use ratio is projected at 36.8 percent, down from the record 37.4 percent in 2020/21.

India's 2022 Export Forecast Was Again Revised Up

Global rice trade in calendar year 2022 is projected at 48.7 million tons (milled basis), down just 50,000 tons from the previous forecast and down more than 0.6 million from the year-earlier record. Much of the expected year-to-year decline in global trade is the result of weaker imports of Indian rice by Bangladesh and Vietnam. India's 2022 exports are projected to drop 2.0 million tons from the 2021 record to a revised 18.0 million, still the second-highest on record. Cambodia's exports are projected to drop 0.3 million tons from the revised 2021 record to 1.4 million tons, and China's exports are projected to decline 0.2 million tons to 2.1 million tons. U.S. exports are forecast to drop 0.1 million tons in 2022 to 2.85 million tons due to tighter supplies and resulting higher prices. These declines in exports in 2022 are expected to be partially offset by increased exports from Australia, Brazil, Burma, EU, Pakistan, Paraguay, Thailand, Uruguay, and Vietnam, with Thailand's exports projected to increase the most, up 0.9 million tons to 6.5 million. Australia's exports are projected to increase 0.2 million tons to 260,000 tons based on an expected recovery from drought.

On the global 2022 import side, Bangladesh's imports are projected to drop 1.9 million tons to 0.6 million due to a larger crop. Vietnam's imports are projected to decline 1.15 million tons to a more typical 0.50 million from this year's abnormally high record of almost 1.7 million tons. The bulk of Vietnam's imports are typically border shipments from Cambodia, with Vietnam taking mostly rough rice. This year, Vietnam has imported large quantities of broken kernel rice from India for feed use, food processing, and beer. These purchases are not expected to continue in 2022. Imports are also projected to decline in 2022 for Australia, Brazil, the Philippines, South Korea, Saudi Arabia, Senegal, South Africa, and Venezuela.

In contrast, imports are projected to increase in 2022 for Angola, Colombia, Costa Rica, Cote d'Ivoire, Cuba, Egypt, Ethiopia, EU, Gambia, Iran, Iraq, Jordan, Kenya, North Korea, Liberia, Madagascar, Mozambique, Nepal, Nigeria, Oman, Panama, Qatar, Somalia, Togo, Turkey, the United Arab Emirates, and the United States. Egypt is expected to show the largest import growth in 2022, with its imports projected to increase 0.4 million tons to a record 0.8 million due to a much smaller crop. China is expected to remain the largest rice importer in 2022, taking 4.5 million tons, unchanged from the 2021 revised forecast.

The global rice trade forecast for 2021 was raised more than 0.3 million tons to 49.3 million, up 4.1 million tons from a year earlier and the highest on record. On the export side, Cambodia's exports were raised 0.4 million tons to a record 1.7 million, while export forecasts were lowered 50,000 tons each for Burma and the EU. On the 2021 import side, China's imports were raised 0.5 million tons to 4.5 million, 41 percent above a year earlier. Vietnam's 2021 imports were raised 0.4 million tons to a record of almost 1.7 million tons, while import forecasts for Iran and the United Arab Emirates were each lowered 0.1 million tons.

Over the past month, quotes for Thailand's trading prices for most grades of regularly milled white rice (excluding aromatic rice and brokens) decreased 1.0-1.5 percent from a month earlier, mostly due to a further weakening of the Thai *baht* in late October. Thailand's 100-percent Grade B long-grain milled rice for export was quoted at $391 per ton for the week ending November 1, down $6 from the week ending October 4. Prices for Thailand's 5-percent brokens parboiled rice—a specialty rice—were quoted at $383 per ton for the week ending November 1, down $4 from the week ending October 4. In contrast, prices for Thailand's jasmine rice—a premium aromatic—were quoted at $648 per ton for the week ending November 1, up $5 from the week ending October 4.

Price quotes for Vietnam's rice for the late-autumn crop whose harvest is now complete were unchanged from a month earlier, despite the start of the 10th month (or winter) crop harvest in the south. For the week ending November 2, prices for Vietnam's 5-percent broken-kernel long-grain milled rice were quoted at $435 per ton, unchanged from the week ending October 5. Vietnam's quotes are currently the highest among the Asian exporters for comparable grades and quality.

Pakistan's price quotes for 5-percent broken rice decreased $10 per ton from the week ending October 5 to $360 for the week ending November 2. India's 5-percent broken nonparboiled white rice was quoted at $350 per ton (bulk) for the week ending November 2, down $5 from the week ending October 5. India remains the most competitively priced rice exporter in Asia.

Price quotes from most South American exporters either declined from a month earlier or were unchanged. Uruguay's generic 5-percent broken-kernel long-grain milled rice was quoted at $545 per ton for the week ending November 2, down $35 from the week ending October 5. The price quote is $5 below the current U.S. price for long-grain milled rice for Latin American markets. Price quotes for higher priced nongeneric shipments from Uruguay were unchanged over the past month. Argentina's 5-percent brokens remain quoted at $610 per ton. In contrast, prices for Brazil's generic 5-percent broken-kernel rice were quoted at $440 per ton for the week ending November 2, down $65 from the week ending October 5.

U.S. trading prices for long-grain milled rice were unchanged over the past month. Prices for U.S. long-grain milled rice, Number 2 Grade, 4-percent broken kernels (free on board a vessel at a Gulf port, Iraqi specifications) remain quoted at $600 per ton for the week ending November 2, unchanged since the week ending July 20. U.S prices for Latin American milled-rice markets—Haiti, Colombia, and Mexico—remain quoted at $550 per ton for the week of November 2, unchanged since the week ending August 3. In contrast to the milled-rice prices, U.S. rough-rice export price quotes decreased $10 from late October to $340 per ton for the week ending November 2.

Milled-rice prices in California either declined or were unchanged over the past month depending on the specification. Prices for California Number 1 Grade, 4-percent broken kernels for the week ending November 2 remain quoted at $1,125 per ton (free on board at a domestic mill, Mediterranean specifications), unchanged since early September. These are the highest prices since June 2009. In contrast, prices for delivery to the Port of Oakland, California, medium-grain milled-rice (Korean specifications) were quoted at $1,240 per ton for the week ending November 2, up $15 from the week ending October 5. For listings of trading prices by exporter and grade of rice, see table 9 in the Excel file.

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