



Rice Outlook

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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 Projection Lowered 3.5 Percent to 190.5 Million Hundredweight

There were several revisions this month to the U.S. 2021/22 supply and use balance sheet for rice. On the supply side, the production forecast was reduced 6.9 million hundredweight (cwt) to 190.5 million due to a smaller harvested area. Production, area, and yield were revised this month based on data recently released by the U.S. Department of Agriculture's National Agricultural Statistics Service (NASS). In addition, carryin was lowered 0.3 million cwt to 43.7 million, also based on NASS data. On the demand side, the total domestic and residual use forecast was lowered 4.0 million cwt to 147.0 million cwt, the third consecutive month of a downward revision.

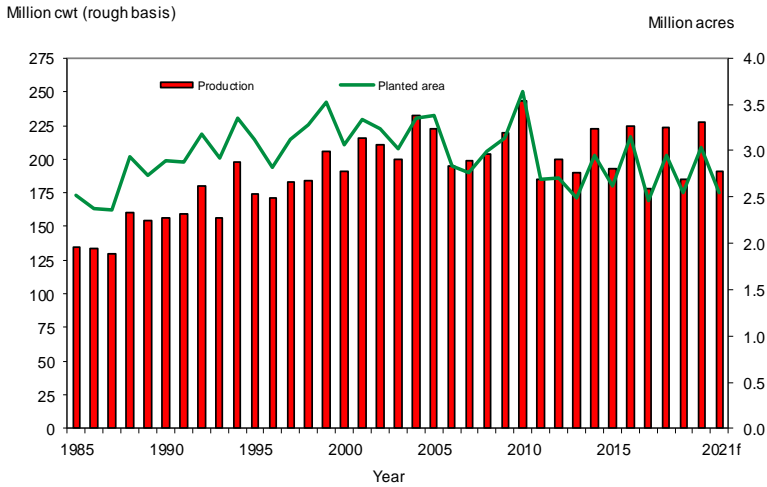
The above supply and use revisions resulted in a 3.1-million cwt reduction in the 2021/22 ending stocks forecast to 34.2 million cwt. The 2021/22 season-average farm price forecasts were raised for both classes of rice based on the tighter expected supply situation. For 2020/21, imports, exports, and ending stocks were all revised based on recently released yearend data, with total domestic and residual use adjusted to balance supply and use revisions.

The 2021/22 global production forecast was raised 0.5 million tons (milled basis) to 507.9 million, the highest on record. Production forecasts for 2021/22 were raised this month for India, Panama, Senegal, and South Korea, but lowered for Egypt and the United States. Global rice consumption and residual use in 2021/22 is projected to be a record 512.1 million tons, down 2.2 million tons from the previous forecast, with India accounting for the bulk of this month's reduction in the global consumption and residual use forecast. India's consumption and ending stocks estimates and forecasts for 2019/20-2021/22 were substantially revised this month based on midyear stocks data indicating larger beginning stocks in 2020/21.

Global rice trade in calendar year 2022 is projected at 48.0 million tons (milled basis), up almost 0.4 million tons from the previous forecast but 0.2 million tons below the year-earlier revised near-record high. India's 2022 export forecast was raised this month, while Pakistan's was lowered. Import forecasts were raised for Bangladesh and Egypt but lowered for Australia and Senegal.

Over the past month, quotes for Thailand’s trading prices for most grades of regularly milled white rice (excluding aromatic rice) increased 1.5-2.5 percent. Vietnam’s price quotes also increased, while quotes from most South American suppliers were unchanged. U.S. trading prices for long-grain milled rice were unchanged over the past month. In contrast, milled-rice prices in California increased over the past month, largely a response to expectations of a much smaller harvest in 2021/22.

Figure 1
U.S. rice production in 2021 is projected to decrease more than 16 percent



Cwt = Hundredweight. 2021f = forecasts.
 Source: USDA, Economic Research Service, *Rice Yearbook Data Set*, March 2021, 1985-2018; and USDA, World Agricultural Outlook Board, *World Agricultural Supply and Demand Estimates*, 2019-2021.

Domestic Outlook

U.S. 2021/22 Rice Crop Projected To Be Down 16 Percent From a Year Earlier

The 2021/22 U.S. rice production forecast was reduced 6.9 million cwt to 190.5 million, more than 16 percent smaller than a year earlier. This month's crop reduction was due to a smaller harvested-area forecast. At 2.5 million acres, rice harvested area is 4.5 percent below the previous forecast and more than 16 percent below a year earlier. Despite this month's downward revision, harvested area is still slightly above 2019/20 harvested area, which was a year of record-high preventive plantings. The 2021/22 planted and harvested area estimates were reported by the U.S. Department of Agriculture's National Agricultural Statistics Service (NASS) in its September 10 *Crop Production* report. The revised area estimates were based on a thorough review of all available data.

Harvested area estimates were lowered from the August estimates in all reported States this month, with Louisiana's estimate reduced by 41,000 acres (9 percent) and Missouri's area estimate by 39,000 acres (17 percent). Area reductions in the remaining four reported rice growing States were much smaller, with the Texas harvested area estimate lowered just 1,000 acres this month.

In contrast, the 2021/22 average U.S. yield forecast was raised 79 pounds to 7,623 pounds per acre, 4 pounds above a year earlier and the third-highest on record. The revised yield is based on a survey of rice producers conducted from August 25 to September 7 that asked growers about probable yields. Revised yield estimates were reported for all rice and by State. Yield forecasts were raised this month for all reporting States except Arkansas, where the yield was unchanged from the August estimate, with yields revised up about 4 percent for both Missouri and Texas. Upward yield revisions were around 1 percent in California, Louisiana, and Mississippi. Survey-based yields by class for the United States and by State will be reported by NASS in the January 2022 *Crop Production 2021 Summary*.

By class, the 2021/22 long-grain production forecast was lowered 4 percent to 144.2 million cwt, almost 16 percent below a year earlier. Much of the long-grain production decline in 2021/22 is the result of a substantial number of Delta growers shifting to soybeans and corn due to higher expected returns. Excessive rainfall all spring also reduced plantings in the South, where virtually all U.S. long-grain rice is grown. The combined medium- and short-grain production forecast was reduced 2 percent to 46.3 million cwt, 18 percent below a year earlier and the smallest since 2005/06; the severe drought in California a major factor behind the substantial decline in the U.S. medium- and short-grain crop. California typically accounts for around 70 percent of the U.S. medium- and short-grain rice production and medium- and short-grain accounts for virtually all of the State's rice area.

Production forecasts were lowered this month for all States except Texas. Louisiana and Missouri accounted for more than 70 percent of the downward revision, with Louisiana's crop lowered more than 8 percent and Missouri's revised down 13.5 percent. Mississippi's crop forecast was reduced almost 7 percent, while the Arkansas and California crop forecasts were each lowered about 1.5 percent this month. In contrast, NASS raised its Texas production forecast almost 4 percent.

Harvested area is estimated below a year earlier in all reported States except Texas. In the Delta, harvested area in Arkansas is reported at 1.20 million acres, 17 percent below a year earlier. Mississippi's 2021/22 rice harvested area is reported at 101,000 acres, 39 percent below a year earlier and the smallest since 1973/74. In Missouri, 2021/22 harvested area is reported at 194,000 acres, down 9 percent from a year earlier. On the Gulf Coast, Louisiana's harvested area is reported at 413,000 acres, 13 percent below a year earlier. In Texas, 2021/22 harvested area is reported at 188,000 acres, up 9,000 from a year earlier. In much of the South, persistent rainfall nearly all spring prevented and delayed plantings on a substantial amount of rice acreage. On September 1, the U.S. Department of Agriculture's Farm Service Agency (FSA) reported prevented plantings in the South at more than 354,000 acres, down 23 percent from a year earlier. In 2020/21, excessive rainfall nearly all spring also prevented and delayed plantings across the South. In 2019/20, preventive plantings exceeded 700,000 acres in the South, the highest on record, also a result of excessive rainfall all spring.

Finally, in California, rice harvested area was reported at just 405,000 acres, 21 percent below a year earlier. The sharp decline in California area this year is the result of severe drought and abnormally low reservoir levels in northern California. In California, the drought reduced rice acreage to its lowest since 1992/93. On September 1, FSA reported prevented plantings in California at 102,736 acres, notably above about 33,000 a year earlier.

Yields are projected to be above a year earlier in California, Louisiana, and Missouri, below a year earlier in Mississippi and Texas, and unchanged in Arkansas. At 8,000 pounds per acre, Missouri's 2021/22 yield is up 10 percent from a year earlier and is the highest on record. Louisiana's yield of 6,850 pounds per acre is up just 30 pounds from a year ago. Despite a severe drought and record-low reservoir levels, the California 2021/22 yield is forecast at 8,800 pounds per acre, up 1 percent from a year earlier but still 90 pounds below the 2015/16 record. At 7,300 pounds, the Texas 2021/22 yield is down more than 10 percent from the year-earlier near-record. Mississippi's yield of 7,400 pounds per acre is 20 pounds below a year-earlier record. The Arkansas yield is forecast at 7,500 pounds per acre.

Production is projected below a year earlier in all reported States, although the decline in Missouri is minuscule. The Arkansas 2021/22 rice crop is projected at 89.9 million cwt, down almost 17 percent from a year earlier, a result of smaller area. Mississippi's production is forecast at 7.47 million cwt, down 39 percent from a year earlier and the smallest since 1983/84. The sharp decline is due almost entirely to reduced plantings. Missouri's projected rice crop of 15.5 million cwt is virtually unchanged from a year ago, as a record yield offset an area decline. The Louisiana production forecast of 28.3 million cwt is 12 percent below a year earlier, a result of smaller plantings. Texas rice production is projected at 13.7 million cwt, a decline of 6 percent, a result of a weaker yield; planted area actually expanded. Finally, California's production is forecast at 35.6 million cwt, more than 20 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 1998/99.

Harvest of the 2021/22 U.S. Southern Rice Crop Is Slightly Behind Normal

Persistent rainfall across the South this spring delayed plantings and field operations, which has led to a slightly slower-than-average harvest pace to date. For the week ending September 5, 28 percent of the U.S. 2021/22 rice crop was reported harvested, 3 percentage points ahead of a year earlier but 3-percentage points behind the U.S. 5-year average. Harvesting progress varied by region and by State. In the Delta, 18 percent of the 2021/22 Arkansas rice crop was

reported harvested by September 5, which was 9 percentage points ahead of a year earlier but 4 percentage points behind the State's 5-year average. Similar to this year, in 2020/21, continuing rainfall nearly all spring and well into the summer delayed planting, crop progress, and harvest in the Delta, the largest U.S. rice growing region. In nearby Mississippi, 18 percent of the 2021/22 rice crop was reported harvested by September 5, ahead of the 13-percent reported a year earlier but well behind the Mississippi 5-year average of 32 percent. In contrast, the Missouri 2021/22 rice crop was reported 6 percent harvested by September 5, while a year earlier the harvest had not yet begun by this date. Missouri's 2021/22 harvest pace is even with the State's 5-year average.

Crop progress was more advanced on the Gulf Coast, as expected based on its latitude and climate. For the week ending September 5, 80 percent of the Louisiana 2021/22 rice crop was harvested, 5 percentage points behind a year earlier and 3 percentage points behind the Louisiana 5-year average. In Texas, 84 percent of the 2021/22 rice crop was reported harvested by September 5, behind both the 91 percent harvested a year earlier and the Texas 5-year average of 86 percent. Like the Delta, much of the Gulf Coast has experienced persistent rainfall this spring and summer that has delayed the timing of some field application. In California, 3 percent of the 2021/22 rice crop was reported harvested by September 5, 1 percentage point ahead of a year earlier and 2 percentage points ahead of the California 5-year average. This year's much smaller California rice acreage enabled an earlier completion of planting.

U.S. 2021/22 Total Supply Forecast Lowered 7.1 Million Cwt

Total U.S. rice supplies in 2021/22 are projected at 272.2 million cwt, down almost 3 percent from the previous forecast and 6 percent below a year earlier. This month's downward revision is the result of a substantially reduced forecast for production and slightly smaller carryin. The year-to-year decline is the result of a much smaller crop more than offsetting a big boost in carryin and record imports. At 203.9 million cwt, U.S. 2021/22 long-grain supplies are almost 4 percent below the previous forecast and 5 percent smaller than a year earlier. Combined medium- and short-grain supplies are projected at 65.7 million cwt, 1 percent below the previous forecast, more than 11 percent below a year earlier and the smallest since 2008/09.

The 2021/22 U.S. carryin was lowered 0.3 million cwt to 43.7 million cwt, almost 53 percent above the year-earlier abnormally low level. This month's slight downward revision was due to nearly-offsetting revisions in the 2020/21 estimates for imports, exports, ending stocks, and domestic disappearance. The 2021/2 long-grain carryin was lowered 2.0 million cwt to 29.7 million cwt, 76 percent larger than in 2020/21. In contrast, the 2021/22 medium- and short-grain carryin was raised almost 3 percent to 11.5 million cwt, 7 percent larger than a year earlier.

U.S. 2021/22 all-rice imports remain forecast at 38.0 million cwt, almost 12 percent larger than the year-earlier revised estimate and are the highest on record. U.S. long-grain imports remain forecast at 30.0 million cwt, up almost 10 percent from the year-earlier revised estimate and are also the highest on record. Asian aromatics, primarily jasmine from Thailand and basmati from India and Pakistan, are expected to continue to account for the bulk of U.S. long-grain imports. Shipments of broken kernel rice are expected to account for most of the remaining long-grain imports, with Brazil currently supplying the bulk.

Medium- and short-grain imports remain projected at a record 8.0 million cwt in 2021/22, 19 percent larger than the year-earlier revised estimate. 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. 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 delivered 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.

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

Total use of all rice in 2021/22 is projected at 238.0 million cwt, down 4.0 million cwt from the previous forecast—a result of a reduction in the domestic and residual use forecast—and almost 4 percent smaller than the year-earlier revised record. Both exports and combined domestic and residual use are expected to be smaller than a year earlier in 2021/22. Long-grain total use is projected at 180.0 million cwt, down 3.0 million cwt from the previous forecast and 3 percent smaller than the year-earlier revised estimate. Combined medium- and short-grain total use is forecast at 58.0 million cwt, down 1.0 million from the previous forecast and more than 5 percent below 2020/21.

U.S. exports of all rice in 2021/22 remain projected at 91.0 million cwt, down 3 percent from the year-earlier revised estimate. The year-to-year decline in U.S. exports is based on smaller U.S. supplies and less-competitive U.S. prices. Long-grain exports in 2021/22 remain projected at 65.0 million cwt, nearly unchanged from a year earlier. The United States is expected to face stronger competition from the South American suppliers in key Latin American markets in 2021/22, largely offsetting the impact of the recent large sales to Iraq. 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.

Combined medium- and short-grain exports in 2021/22 remain projected at 26.0 million cwt, down 10 percent from the revised 2020/21 forecast. The year-to-year decline in exports is based on expectations 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 in 2022, Australia is expected to be in position to increase its exports due to a projected 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 the Middle East and North Africa the major markets.

By type, U.S. rough-rice exports in 2021/22 remain projected at 33.0 million cwt, down almost 5 percent from the year-earlier revised level. 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. Milled-rice exports (milled-and brown-rice exports on a rough-rice basis) remain projected at 58.0 million cwt. The United States is expected to make few sales of milled rice beyond Northeast Asia, Haiti, Canada, Iraq, Jordan, Saudi Arabia, and Israel. In addition, 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.

Total domestic and residual use in 2021/22 is projected at 147.0 million cwt, down 4.0 million from the previous forecast and the third consecutive month of a downward revision. Domestic and residual use is forecast 4 percent below the year-earlier revised record. The downward revision is based on the reduced crop. The year-to-year projected reduction is based on smaller U.S. supplies. Long-grain domestic and residual use is projected at 115.0 million cwt, down 3.0 million cwt from the revised previous forecast and almost 4 percent below the year-earlier revised record. Combined medium- and short-grain domestic and residual use is projected at 32.0 million cwt, down 1.0 million from the previous forecast and more than 1 percent below a year earlier.

The above supply and use revisions result in a 2021/22 ending stocks forecast of 34.2 million cwt, down 3.1 million cwt from the previous forecast and 22 percent less than the year-earlier revised estimate. The all-rice stocks-to-use ratio is projected at 14.4 percent, down from a revised 17.7 percent a year earlier. Long-grain ending stocks are projected at 23.9 million cwt, down 4.8 million from the previous forecast and 19.5 percent below the year-earlier revised estimate. The long-grain stocks-to-use ratio is projected at 13.3 percent, down from a revised 16.0 percent a year earlier. Combined medium- and short-grain ending stocks are projected at 7.7 million cwt, up 0.3 million from the previous forecast but 29 percent smaller than a year earlier. The 2021/22 medium- and short-grain stocks-to-use ratio is projected at 13.3 percent, down from a revised 18.7 percent a year earlier.

U.S. 2020/21 Imports, Exports, and Ending Stocks Revised Based on Yearend Data

There were several small revisions this month to the 2020/21 U.S. rice balance sheet based on yearend import and export data reported by the U.S. Bureau of Census and August 1 stocks data reported by NASS.

On the 2020/21 supply-side, imports were raised 1 percent to 34.1 million cwt, with estimates for both classes of rice raised slightly. For long-grain rice, the upward revision was due to a 27,086-ton shipment of broken kernels from Brazil in July that more than offset lower-than-expected imports of Thailand's jasmine rice. This was the second-largest monthly shipment of broken kernel rice from Brazil, down 12 percent from the December 2018 record. In 2020/21, Brazil shipped a record 53,791 tons of broken kernel rice to the United States. For medium- and short-grain rice, a fourth shipment of 21,000 tons arrived in Puerto Rico in July, from China, as anticipated. China provided three of the four shipments of 21,000 tons to Puerto Rico in 2020/21, with India supplying one. The pace of Puerto Rico's purchases has increased recently.

On the demand side, total exports were lowered fractionally to 93.9 million cwt, nearly unchanged from a year earlier, with long-grain exports raised 0.1 million cwt and combined medium- and short-grain imports lowered 0.2 million cwt.

Based on data reported in the NASS August *Rice Stocks*, total ending stocks of rice (combined milled and rough-rice stocks converted to a rough-rice basis) in 2021/22 were 43.7 million cwt, down 0.3 million from the previous forecast but 52 percent larger than the year-earlier abnormally low level of ending stocks. By class, long-grain ending stocks were lowered 2.0 million cwt to 29.7 million, 76 percent larger than a year earlier. Combined medium- and short-grain ending stocks were raised 0.3 million cwt to 11.5 million cwt, 7 percent larger than a year

earlier. The combined domestic and residual use accounts for all-rice and by class were revised to balance these data-driven trade and stocks revisions.

U.S. 2021/22 Season-Average Farm Price Forecasts Raised

For 2021/22, season-average farm (SAFP) price forecasts were raised for both classes of rice based on the tighter expected supply situation. The 2021/22 long-grain SAFP was raised 10 cents per cwt to \$13.00 per cwt, up 40 cents from a year earlier. The California medium- and short-grain 2021/22 SAFP forecast was raised \$1.00 per cwt to \$23.00, up \$3.30 from 2020/21 and the highest since the 2008/09 record of \$27.40 per cwt. The southern medium- and short-grain SAFP forecast was raised 50 cents to \$14.00 per cwt, up \$1.00 from 2020/21 and the highest since 2014/15. With a substantial decrease in the California crop likely 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 forecast was 80 cents to \$20.10 per cwt, \$2.40 higher than the year-earlier revised estimate. The 2021/22 U.S. all-rice SAFP was increased 30 cents per cwt to \$14.80 per cwt, up \$1.10 from the year-earlier U.S. SAFP.

Last month NASS reported July cash prices and marketings, which completed the 2020/21 market year. The combined medium- and short-grain SAFP was raised 10 cents to \$17.70 per cwt, down 50 cents from a year earlier. Neither the southern nor the California medium- and short-grain 2020/21 SAFP were revised this month. The long-grain SAFP remains estimated at \$12.60, up 60 cents from a year earlier. The 2020/21 all-rice SAFP forecast was lowered 20 cents to \$13.70 per cwt, up 10 cents from a year earlier.

International Outlook

Production Forecasts for 2021/22 Raised for India and Senegal, but Lowered for Egypt and the United States

Global rice production in 2021/22 is forecast at a record 507.9 million tons (milled basis), up 0.5 million tons from the previous forecast and more than 1.7 million tons larger than the year-earlier revised crop. Production forecasts for 2021/22 were raised this month for India, Panama, Senegal, and South Korea, but lowered for Egypt and the United States. On an annual basis, Argentina, Australia, Bangladesh, Burma, Cambodia, China, Cote d'Ivoire, Guinea, Guyana, Mali, Mexico, Nicaragua, Niger, Nigeria, Senegal, South Korea, Paraguay, Peru, Thailand, Uganda, and Uruguay account for the bulk of the projected production increase in 2021/22, with China and Thailand showing the largest year-to-year production increases.

In contrast, crops are projected to be smaller than a year earlier in Colombia, Ecuador, Egypt, EU, Iraq, Kazakhstan, Madagascar, the Philippines, Russia, the United States, 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 512.1 million tons, down 2.2 million tons from the previous forecast but 10.1 million tons larger than the year-earlier revised estimate. India accounts for the bulk of this month's reduction in the global consumption and residual use forecast. The U.S. 2021/22 consumption and residual use was lowered 0.2 million tons to 4.6 million tons based on a smaller crop and expected tighter supplies.

India's 2021/22 consumption and residual use forecast was lowered 3.0 million tons to 105.0 million, up 2 percent from the year earlier revised estimate and the highest on record. This month's substantial reduction in India's domestic and residual use forecast is based on midyear stocks data that indicated India's beginning stocks in 2020/21 were higher than previously estimated. As India's monthly exports soared during the second half of the 2019/20 October-September market year, exporters began to hold more stocks than normal to ensure sufficient quantities would be available for future shipments. In addition, the Government of India began distributing larger quantities of free rice or low-priced rice to a majority of the population during 2019/20 in response to the COVID-19 pandemic. Initially, it appeared that the population immediately consumed the additional rice. However, current stocks data suggest that consumers kept a portion of it, thus increasing the level of stocks going into 2020/21. As a result, India's annual consumption has been revised down since 2019/20 to reflect the higher stocking, with 2020/21 consumption and residual use lowered 4.3 million tons to 102.7 million and 2019/20 consumption and residual use lowered 4.0 million tons to 102.0 million tons. India's current stocks are record high.

On an annual basis, China accounts for the largest share of the projected increase in global rice consumption and residual use in 2021/22, with China's total domestic and residual use expected to increase 5.4 million tons to a record 155.7 million tons. Industrial and feed uses account for nearly all of China's projected increase in consumption and residual use in 2021/22. India's consumption and residual use is projected to increase 2.3 million tons to a record 105.0 million despite this month's substantial downward revision.

Table A - Global rice production, selected monthly revisions and year-to-year changes, September 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						
Egypt	2,900	-550	-27.5	↓	↓	This month's substantial reduction in Egypt's production forecast is due to a 100,000-hectare decrease in the harvested area estimate to 0.5 million hectares, nearly 29 percent below a year earlier. The area revision is based on announced stricter enforcement of Government area restrictions implemented to conserve water which include both a numerical ceiling on planted area and geographic limits on where rice cultivation can occur and where it is banned. The Government of Egypt earlier this year set allotted rice cultivated area at 451,164 hectares, down marginally from a year earlier as part of the Government's effort to deal with tight water supplies. Most of the diverted land is expected to shift to corn. This would be Egypt's second smallest rice crop since 1998/99. The average yield of 8.41 tons per hectare is up slightly from the previous forecast and 1.5 percent larger than a year earlier.
India	122,000	1,000	-0.2	↑	↓	The slight increase in the production forecast is due to a 0.6-million hectare increase in the harvested area estimate to 45.0 million hectares, unchanged from the year earlier revised estimate and just 0.5 million less than the 2008/09 record high. The upward revision in 2021/22 harvested area is largely based on the Government of India's June announced higher Minimum Support Price for the 2021/22 kharif crop which typically accounts for 85 percent of India's annual rice production. Harvested area was also raised based on an upward revision in the 2020/21 harvested area estimate. Production in 2021/22 is the second highest on record.
South Korea	3,816	46	8.8	↑	↑	Production forecast was raised based on a slightly higher harvested area estimate reported by the Government of Korea. At 732,000 hectares, harvested rice area is up 9,000 hectares from the previous forecast and nearly 1 percent larger than a year earlier and first increase in harvested area since 2000/21. This year's slight area increase was the result of higher producer prices.
Panama	247	33	2.9	↑	↑	Raised the production forecast due on a higher harvested area estimate based on Government of Panama reported plantings through August. At 94,000 hectares, rice harvested area in Panama is up 6,000 hectares from the previous forecast and more than 2 percent larger than the year earlier revised estimate. Both production and yield in 2021/22 for Panama are the highest on record.
Senegal	986	184	7.4	↑	↑	Production forecast was sharply raised this month to a record-high due to stronger area forecast. At 0.4 million hectares, rice harvested area in 2021/22 is up 90,000 hectares from the previous forecast and just 4,000 hectares below the year earlier revised record-high. The upward revision in harvested area is based on Government of Senegal data reporting larger area estimates for both 2019/20 and 2020/1. The 2021/22 average yield of 3.63 tons per hectare is down almost 5 percent from the previous forecast, but is 8.5 percent higher than the year-earlier revised estimate. Senegal's rice production has more than doubled over the past decade, a result of a substantial area expansion.
United States	6,049	-217	-16.3	↓	↓	The U.S. production forecast was lowered this month based on a smaller harvested area estimate reported by the U.S. Department of Agriculture's National Agricultural Statistics Service (NASS). The rice harvested area estimate was lowered 4.5 percent to 1.0 million hectares, more than 16 percent below a year earlier. The South accounted for the bulk of this month's reduction in the harvested area estimate, a result of substantial rainfall all spring and summer that prevented planting. California's harvested area estimate was also lowered this month, a result of severe drought. In contrast, NASS raised its U.S. average yield estimate by 1 percent to 8.55 tons per hectare, virtually unchanged a year earlier.

Continued--

Table A - Global rice production, selected monthly revisions and year-to-year changes, September 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						
Chile	93	-5	-14.7	↓	↓	Lowered the production estimate based on a lower yield. The revised yield and production estimates are from Chile's Ministry of Agriculture. This is the smallest rice crop for Chile since 2016/17.
India	122,270	270	2.9	↑	↑	Raised the crop estimate slightly based on the Government of India's <i>Fourth Advance Estimates</i> that was released in August reporting higher area and a slightly larger crop. The kharif crop--accounting for about 85 percent of total rice production and harvested September through January--was reported at a record 104.41 million tons. The smaller rabi crop--harvested March to June--was reported at 17.86 million tons, also a record high. Rice harvested area was raised 0.6 million hectares to 45.0 million, up 3 percent from a year earlier.
North Korea	1,398	38	-23.2	↑	↓	Production forecast was raised based on United Nations Food and Agriculture Organization (FAO) data reporting a higher yield and larger crop. At 4.44 tons per hectare, the 2020/21 average yield was up 6 percent from the previous estimate but still almost 25 percent below the year earlier revised record. Harvested area was lowered 15,000 hectares to 485,000, still 2 percent above the earlier revised estimate. This month, USDA revised its area, yield, and production estimates for North Korea from 2012/13-2020/21 based on FAO data.
Panama	240	35	3.9	↑	↑	Increased the crop estimated based on higher area and yield estimates reported by the Government of Panama. Rice harvested area was raised 7,000 hectares to 92,000 while the average was increased 8 percent to a near-record 4.01 tons per hectare, up 6 percent from a year earlier.
Philippines	12,416	-44	4.1	↓	↑	Production estimate was lowered based on the Government of the Philippines' recently released data for April-June 2021 production which completes the July 2020-June 2021 market year. The average yield was lowered slightly to 4.14 tons per hectare, still up more than 1 percent from a year earlier. Harvested area remains estimated at 4.762 million hectares, up nearly 3 percent from a year earlier. Despite this month's downward revisions, both yield and production were record high in 2020/21.
Senegal	918	129	16.8	↑	↑	The big boost in production was due to a 99,000-hectare increase in harvested area to a record 404,000 hectares, up 17 percent from a year earlier. The average yield was lowered 12 percent to 3.34 tons per hectare, unchanged from a year earlier but well below the 2014/15 record of 4.14 tons per hectare. The revised data were from the Government of Senegal.

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 181.8 million tons, up 11.7 million from the previous forecast but down 4.2 million tons from the year-earlier revised record high. India accounts for the bulk of this month's upward revision in global ending stocks. At 34.5 million tons, India's 2021/22 ending stocks are 11.6 million above the previous forecast and unchanged from the year-earlier revised record high. In contrast, the U.S. 2021/22 rice stocks forecast was lowered 0.1 million tons to 1.1 million, down 0.3 million from a year earlier. China account for the bulk of the projected decline in global ending stocks in 2021/22, with its stocks expected to drop 5.5 million tons to 111.0 million tons. The 2021/22 global stocks-to-use ratio is projected at 35.5 percent, down from a near-record 37.0 percent in 2020/21.

Export Forecasts for 2022 raised for India but Lowered for Pakistan; India's 2021 Exports Raised to Record High

Global rice trade in calendar year 2022 is projected at 48.0 million tons (milled basis), up 0.36 million tons from the previous forecast but 0.2 million tons below the year-earlier revised near-record. Much of the expected year-to-year global trade decline is the result of weaker imports of Indian rice by Bangladesh. India's 2022 exports are projected to drop 2.25 million tons from the 2021 revised record to 16.5 million, still the second-highest on record. U.S. exports are forecast to drop 2.5 percent in 2022 to 2.88 million tons, a result of 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, Cambodia, EU, Pakistan, Paraguay, Thailand, and Uruguay, with Thailand's exports projected to increase the most, up 0.9 million tons to 6.5 million.

Table B - Selected rice importers at a glance (1,000 metric tons), September 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						
Australia	130	-20	-40.9	↓	↓	Import forecast was lowered based on a slower-than-expected pace of shipments thus far in 2021.
Bangladesh	600	100	-71.4	↑	↓	Raised import forecast based on continued government and private purchases despite a record crop and record supplies.
Egypt	800	300	100.0	↑	↑	Raised import forecast to a record-high based on a much smaller crop.
Senegal	1,100	-150	-4.3	↓	↓	Lowered import forecast based on a much larger 2020/21 crop and a record crop forecast for 2021/22.
Table B - Selected rice importers at a glance (1,000 metric tons), September 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	2,100	300	10400.0	↑	↑	Import forecast was increased based on continued government and private purchasing despite a record 2021/22 crop and a record supplies.
Egypt	400	100	29.4	↑	↑	Increased imports based on a much smaller 2021/22 crop.
Guinea	725	25	8.2	↑	↑	Recent import pace has been faster than expected.
Iran	1,050	-100	-6.7	↓	↓	Recent import pace has been slower than expected, especially purchases from top supplier India.
Panama	50	-80	-52.4	↓	↓	Sharply reduced the import forecast based on a slower-than-expected pace of purchases. The United States is the only significant supplier to date in 2021 and there are currently no outstanding sales for U.S. rice.

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), September 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						
Egypt	5	-15	0.0	↓	→	Lowered the export forecast based on much smaller exportable supplies.
India	16,500	500	-12.0	↑	↓	Raised the export forecast based on larger beginning stocks and a slightly higher production forecast. Expect continued strong import demand from Bangladesh.
Pakistan	4,150	-150	1.2	↓	↑	Lowered the export forecast based on a recent slowdown in shipment pace and expectations that India will be more price competitive in 2022 due to larger supplies.
Senegal	70	20	16.7	↑	↑	Export forecast was raised based on a much larger crop forecasts for 2020/21 and 2021/22.
Table C - Selected rice exporters at a glance (1,000 metric tons), September 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 exporters, 2021						
Australia	60	-40	42.9	↓	↑	Export forecast lowered due to a slower-than-expected shipment pace to date.
Egypt	5	-15	-75.0	↓	↓	Lowered export forecast based on a much smaller crop.
India	18,750	250	28.8	↑	↑	Raised the export forecast based on larger stocks than previously estimated and continued large sales to top-buyer Bangladesh.
Malaysia	50	10	66.7	↑	↑	Export forecast was raised based on a faster-than-expected shipment pace to date.
Pakistan	4,100	-100	4.2	↓	↑	Export forecast was lowered based on a slower-than-expected shipment pace to date.
Senegal	60	10	200.0	↑	↑	Consecutive bumper crops have boosted available supplies for export.
Thailand	5,600	-200	-1.9	↓	↓	Lowered export forecast based on a weaker-than-expected shipment pace thus far in 2021 and few new sales.

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

In contrast, imports are projected to decline in 2022 for Australia, Bangladesh, Brazil, China, South Korea, Saudi Arabia, South Africa, and Vietnam. Bangladesh's imports are projected to decrease by 1.5 million tons to 0.5 million, China's by 0.3 million tons to 3.6 million, and Vietnam's by 0.7 million tons from the current record high to 0.5 million tons. In contrast, imports are projected to increase in 2022 for Angola, Colombia, Costa Rica, Cote d'Ivoire, Cuba, Egypt, Ethiopia, EU, Iran, Iraq, Kenya, North Korea, Madagascar, Mozambique, Nepal, Nigeria, Qatar, and the United States.

Over the past month, quotes for Thailand's trading prices for most grades of regularly milled white rice (excluding aromatic rice) increased 1.5-2.6 percent from a month earlier, mostly due to fresh demand for white rice and parboiled rice from Sub-Saharan Africa and some strengthening of the Thai baht. Thailand's 100-percent Grade B long-grain milled rice for export was quoted at \$401 per ton for the week ending September 6, up \$9 from the week ending August 9. Prices for Thailand's 5-percent broken parboiled rice—a specialty rice—were quoted at \$392 per ton for the week ending September 6, up \$10 from the week ending August 9. Prices for Thailand's jasmine rice—a premium aromatic—were quoted at \$637 per ton for the week ending September 6, up \$32 from the week ending August 9.

Price quotes for Vietnam's rice for the autumn crop whose harvest is nearing completion also rose over the past month despite a lack of new sales, mostly due to increased operation and logistics costs caused by COVID-19 restrictions and lockdowns. For the week ending September 7, prices for Vietnam's 5-percent broken-kernel long-grain milled rice were quoted at \$395 per ton, up \$15 from the week ending August 10. Pakistan's price quotes for 5 percent broken rice dropped \$5 per ton from the week ending August 10 to \$360 for the week ending September 7. India's 5-percent broken non-parboiled white rice was quoted at \$370 per ton (bulk) for the week ending September 7, down \$10 from the week ending August 10.

Price quotes from most South American exporters are unchanged from a month earlier. Uruguay's generic 5-percent broken-kernel long-grain milled rice remains quoted at \$580 per ton for the week ending September 10, unchanged since late June and about \$30 per ton above the current U.S. price for long-grain milled rice for Latin American markets. Argentina's 5-percent broken remain quoted at \$610 per ton. In contrast, prices for Brazil's generic 5-percent broken-kernel rice were quoted at \$520 per ton for the week ending September 7, down \$10 from the week ending August 10.

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, Iraq specifications) remain quoted at \$600 per ton for the week ending September 7, 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 September 7, unchanged since the week ending August 3.

In contrast, milled-rice prices in California increased over the past month, largely a response to expectations of a much smaller harvest in 2021/22. Prices for California Number 1 Grade, 4-percent broken kernels for the week ending September 7 were quoted at \$1,125 per ton (free on board at a domestic mill, Mediterranean specifications), up \$25 from the week ending August 10 and the highest since June 2009. For delivery to the Port of Oakland, California, medium-grain milled-rice (Korean specifications) prices were quoted at \$1,225 per ton for the week ending September 7, also up \$25 from the week ending August 10. For listings of trading prices by exporter and grade of rice, see table 9 in the Excel file.

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